

**Newfoundland and Labrador –
Non-Resident Travel Motivations Study 2014**
Profile of Canadian Travellers

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Introduction

- The Non-Resident Travel Survey was conducted by Harris/Decima on behalf of the Department of Tourism, Culture and Recreation, Government of Newfoundland and Labrador, to provide Newfoundland and Labrador Tourism with strategic information to develop a detailed profile of the travel market in terms of attitudes, motivations and perceptions of the province to support developing travel products and marketing programs
- The study had several key objectives:
 - To determine non-residents' perceptions and attitudes towards, as well as their interest in, Newfoundland and Labrador as vacation destination
 - To determine trip motivating factors and identify the importance of activities and travel icons as trip influencers and in destination choice
 - To determine opportunities to influence non-residents to travel to this province.
 - To identify barriers to travel to Newfoundland and Labrador
 - To investigate travel planning behaviour
- The survey focused on vacation/pleasure travel
- For the purposes of this study, vacation/pleasure travel was defined as:
 - Trips outside of own province, of two or more nights, with at least one night spent in paid accommodations, including trips to visit friends and relatives and combined business-pleasure trips
- The survey sample consisted of Canadian travellers from Harris/Decima's online panel
- Panel respondents qualified for participation in the survey
 - **IF** they had taken a vacation/pleasure trip outside their own province in the past three years
 - **OR** would definitely / very likely take such a vacation/pleasure trip in the next year

Methodology

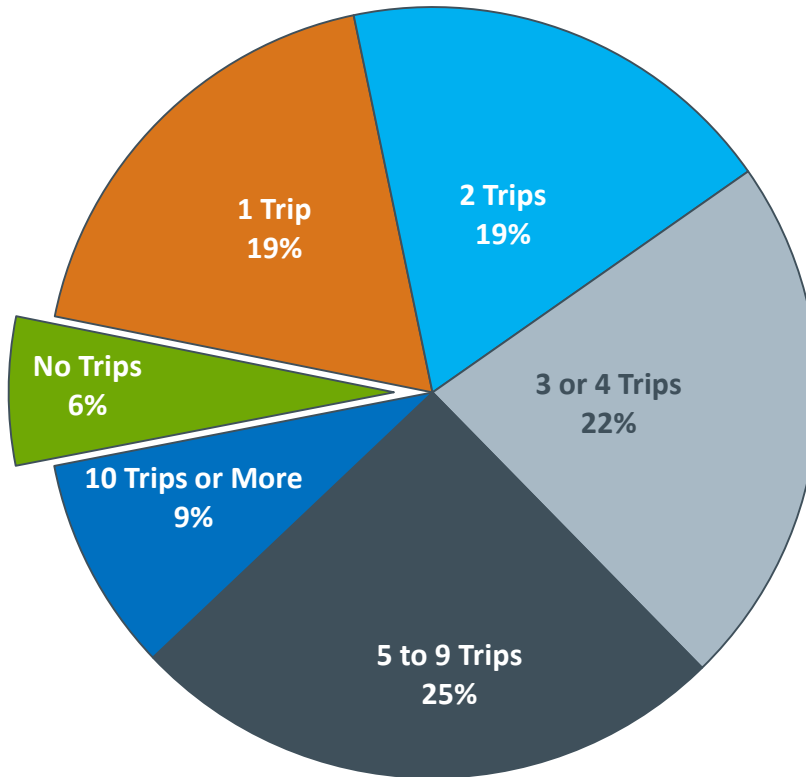
- Harris/Decima conducted an online survey with 1,510 Canadian travellers from Harris/Decima's proprietary online panel of Canadian respondents
- The Canadian panel sample was weighted by region, age and gender using data from Harris/Decima's proprietary TravelPulse research
- Harris/Decima designed the survey questionnaire in close consultation with Newfoundland and Labrador Tourism
- The survey was conducted between 6 and 23 November, 2013
- Results in this report are applicable to **"Canadian travellers"**



1 – Travel Incidence and Past Travel for Canadian Travellers

Travel Incidence

Vacation/Pleasure trips in the past 3 years



Base: Canadian travellers (n=1,457) excluding “Don’t know” responses

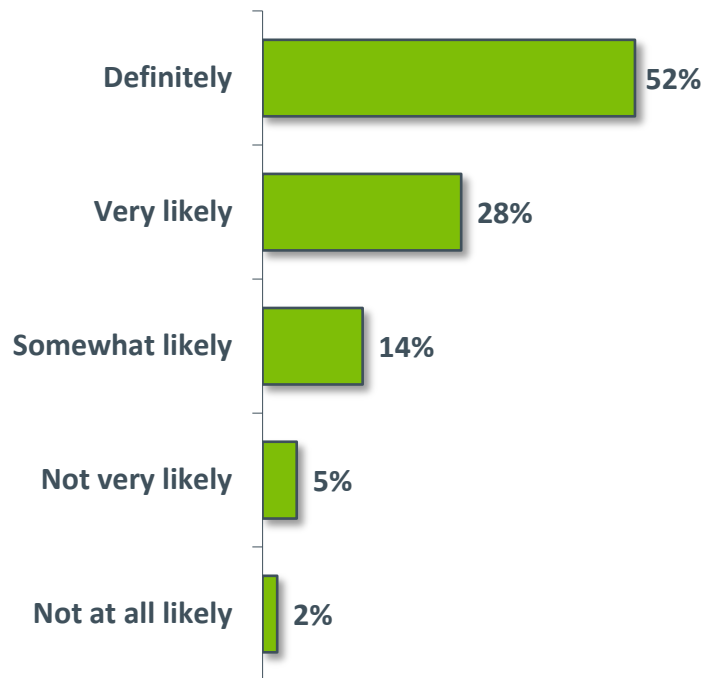
S4b. How many vacation/pleasure trips outside of your own province have you taken in the **past three years**? Include only vacation/pleasure trips of two or more nights where you spent at least one night in paid accommodations.

Demand for travel remains high

- 94% of Canadian travellers took at least one out-of province vacation/pleasure trip in the past 3 years
- Trip intensity is strong, with more than half of travellers (57%) taking 3 or more trips during that period
- Over one third of travellers (34%) travelled 5 or more times
- Almost 1 in 10 Canadians (9%) are avid travellers, taking 10 or more trips

Future Travel

Likelihood to take a vacation/pleasure trip next year



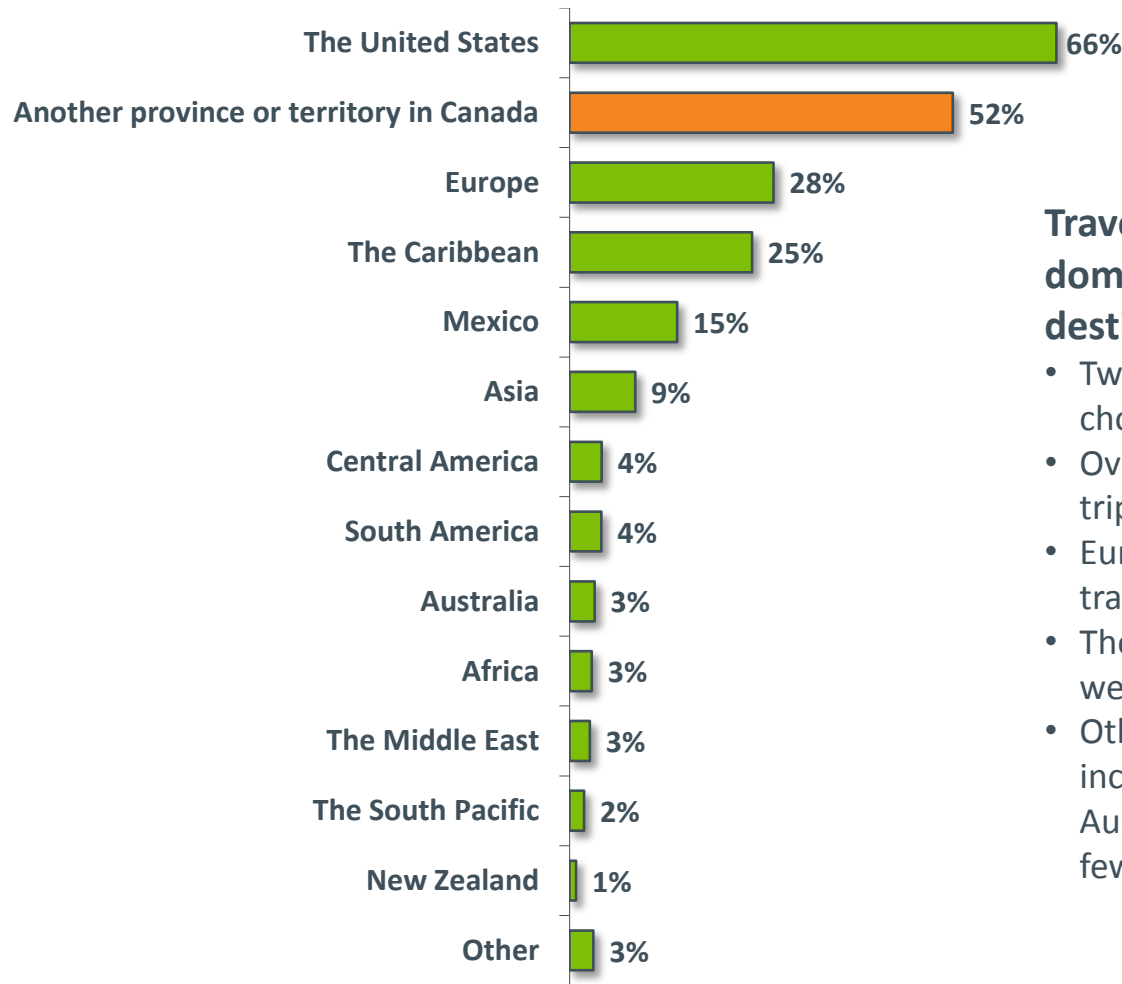
Demand for travel remains high

- Canadian travellers are planning to continue travelling, with 79% expecting to go on vacation trips in the next year
- Over half of travellers indicated that they will 'definitely' travel while another 28% feel 'very likely' to be off on vacation
- Fewer than 1 in 10 Canadian travellers feel less inclined to travel, with only 2% indicating that they are not likely at all

Base: Canadian travellers (n=1,487) excluding "Don't know" responses

S6. In the **next year**, how likely is it that you will take a vacation/pleasure trip of two or more nights outside of your own province where you will spend at least one night in paid accommodations?

Countries or Regions Visited in the Past 3 Years



Travel over the past 3 years was dominated by North American destinations

- Two thirds of Canadian travellers (66%) chose the US as a travel destination
- Over half of travellers (52%) took a vacation trip in their home country
- Europe was a choice for almost 3 in 10 travellers
- The Caribbean (25%) and Mexico (15%) were also sought-after destinations
- Other destinations around the world, including Central and South America, Australia and Africa, were favoured by only few Canadian travellers

Base: Canadian travellers who took trips in the past three years (n=1,378), excluding "Don't know" responses

S5. And which of the following countries or regions did you visit on the vacation/pleasure trips in the **past three years**?

Countries or Regions Visited in the Past 3 Years

Destinations of vacation trips in the past 3 years by province

ORIGIN	Mari-times	Quebec	Ontario	MB/SK	Alberta	British Columbia
DESTINATION						
US	58%	60%	68%	70%	65%	69%
Other province in Canada	74%	42%	45%	74%	70%	51%
Europe	13%	30%	33%	15%	24%	23%
The Caribbean	25%	32%	25%	15%	24%	18%
Mexico	11%	17%	10%	12%	20%	21%
Asia	4%	5%	10%	5%	9%	15%

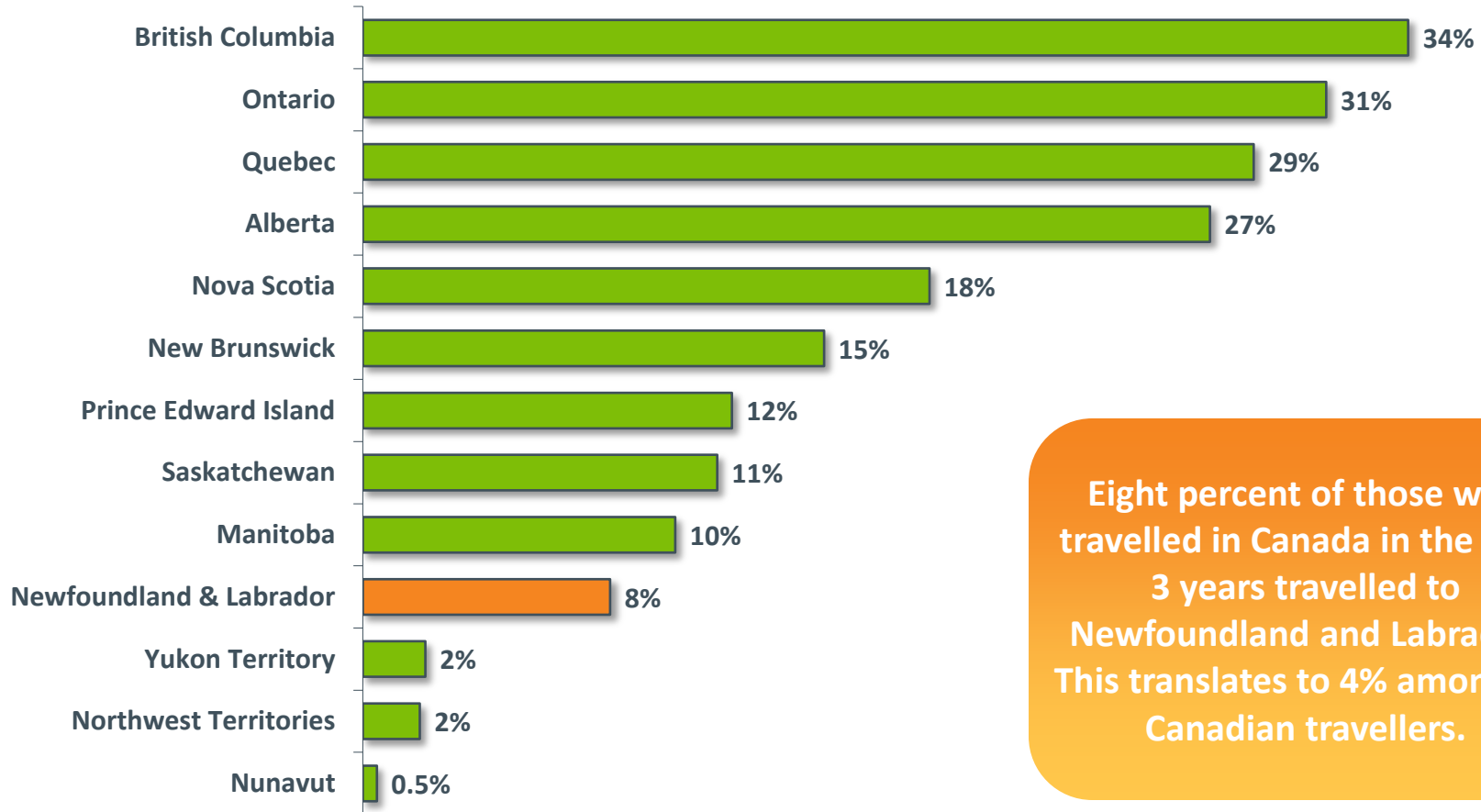
Popular travel destinations vary by province

- Travellers from the Maritimes and QC were less likely to travel to the US than residents of other provinces
- Maritimers and residents of MB/SK were the most likely to have visited a destination in Canada, with almost three quarters of travellers in each of these regions having done so
- Fewer than half of QC and ON residents travelled within Canada while they were more likely to visit Europe and the Caribbean than residents of other provinces/regions
- Residents of AB and BC were the most likely to have gone to Mexico while BC residents were the most likely travellers to Asia

Base: Canadian travellers who took trips in the past three years (n=1,378), excluding "Don't know" responses

S5. And which of the following countries or regions did you visit on the vacation/pleasure trips in the **past three years**?

Canadian Provinces/Territories Visited (Past 3 Years)



Eight percent of those who travelled in Canada in the past 3 years travelled to Newfoundland and Labrador. This translates to 4% among *all* Canadian travellers.

Base: Canadian travellers who travelled within Canada in the past three years (n=707)

S5a. And, which provinces or territories in Canada have you visited in the **past three years**?

Canadian Provinces/Territories Visited

Canadian destinations of out-of-province vacations in the past 3 years

ORIGIN	Mari-times	Quebec	Ontario	MB/SK	Alberta	British Columbia
DESTINATION						
British Columbia	20%	20%	34%	38%	79%	-
Ontario	47%	73%	-	41%	29%	39%
Quebec	45%	-	58%	10%	12%	18%
Alberta	18%	12%	25%	58%	-	68%
Nova Scotia	31%	17%	24%	9%	15%	9%
Newfoundland & Labrador	15%	5%	10%	8%	10%	2%

Distance appears to play some role in where Canadians travel in their own country

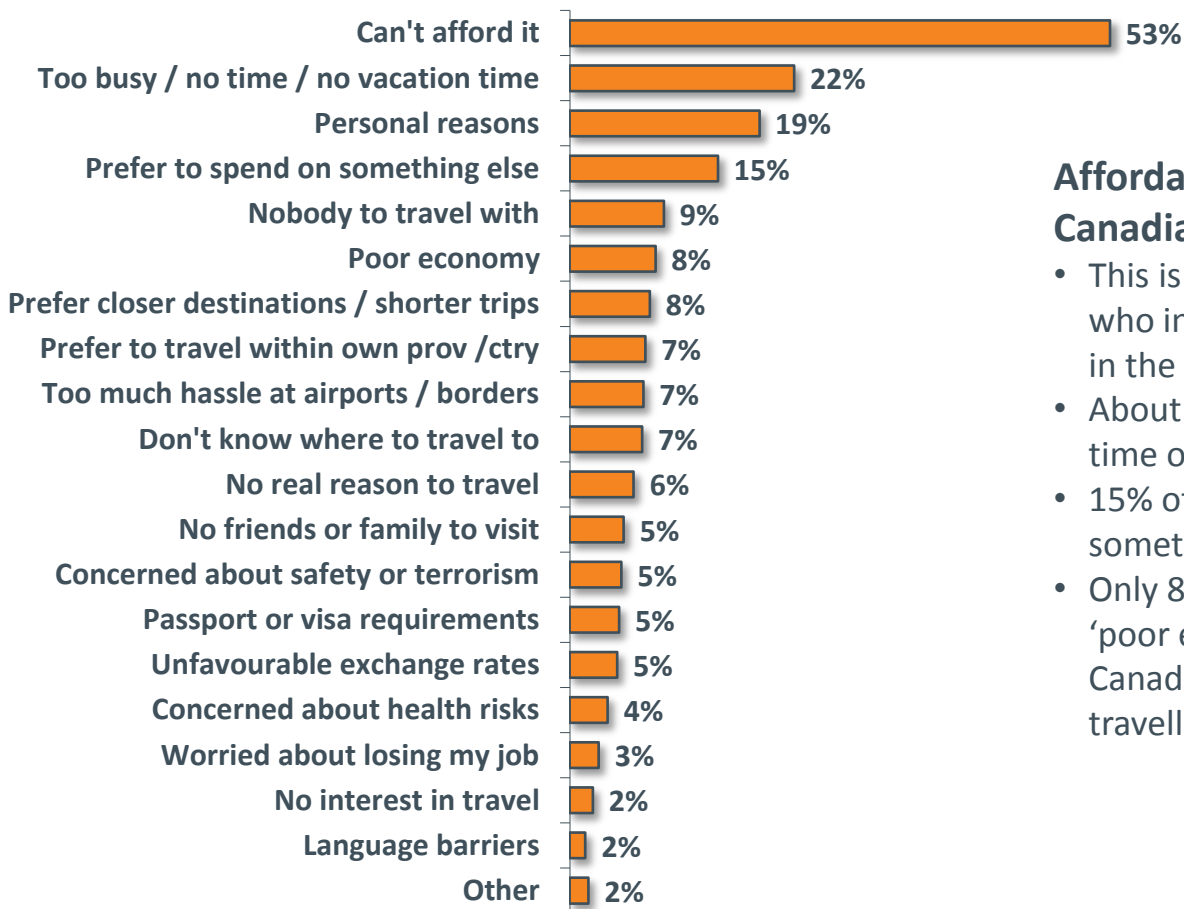
- At only 2 in 10, travellers from the Maritimes and QC were the least likely to travel to BC
- Almost three quarters of QC residents (73%) visited neighbouring ON while Ontarians (58%) and Maritimers (45%) were the most likely to go to QC for a vacation
- Residents of neighbouring MB/SK (58%) and BC (68%) were the most likely to go to AB
- Maritimers, Ontarians and Albertans were to most likely to come to NL while BC and QC residents were the least likely to travel to NL

Base: Canadian travellers who travelled within Canada in the past three years (n=707)

S5a. And, which provinces or territories in Canada have you visited in the **past three years**?

Reasons Preventing Vacation Travel

Reasons for not travelling next year



Affordability is the dominant reason for Canadians not to travel

- This is true for over half of travellers (53%) who indicated that they are unlikely to travel in the next year
- About one fifth of travellers cite a lack of time or personal reasons for not travelling
- 15% of travellers prefer to spend money on something else
- Only 8% are unlikely to travel because of a 'poor economy' while for a similar number of Canadians (8%) distance is a reason for not travelling out-of province

Base: Canadian travellers who are not likely to travel outside own province in the next year (n=318)

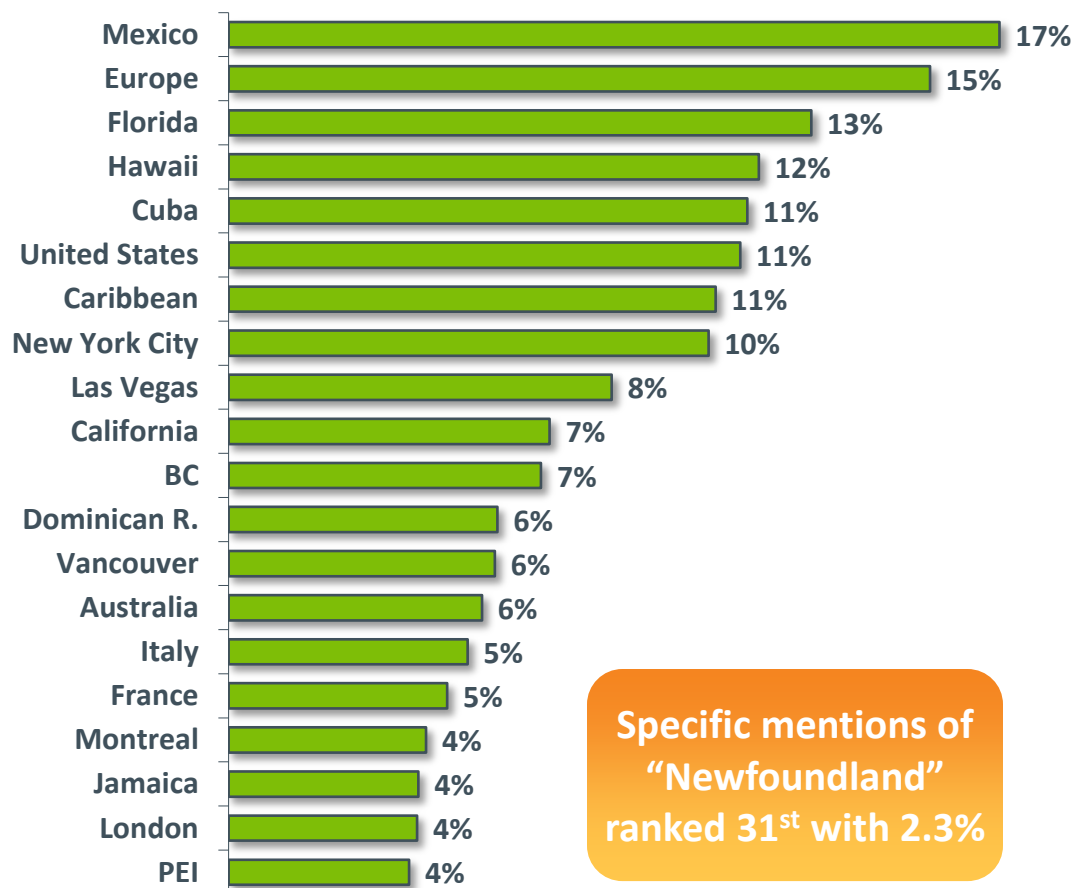
S7. Which of the following reasons is preventing you from taking a vacation/pleasure trip outside of your own province in the next year?

The background features several thin, light green wavy lines at the top and a series of thick, overlapping green bands at the bottom, creating a sense of movement and depth.

2 – Destination Awareness and Travel Intentions for Canadian Travellers

Unaided Destination Awareness - Overall

Top 20 destinations¹



Canadian travellers have sunshine on their minds

- Canadians have very diverse ideas about vacation travel as demonstrated by the variety of top of mind destinations
- "Sun destinations" are a favourite for Canadian travellers when they think of vacation travel, with Mexico claiming top spot
- Europe, the US (general) and New York City are also among popular destinations
- BC (general) and Vancouver are the top top-of-mind destinations in Canada

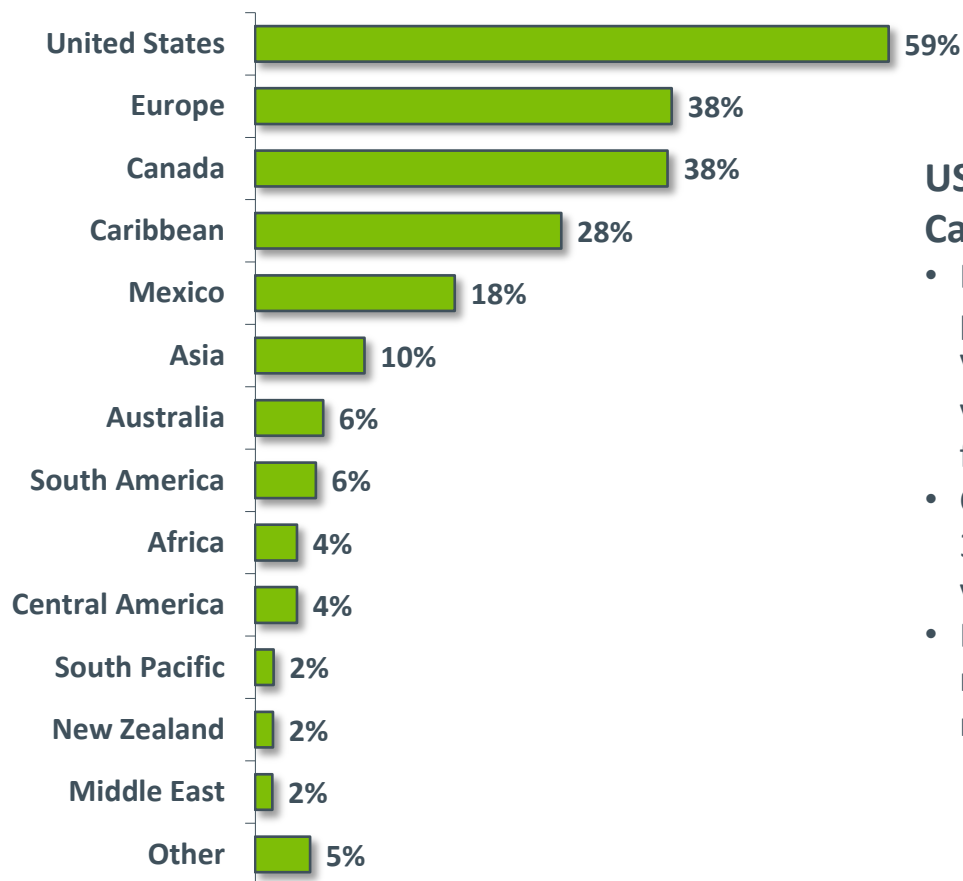
Base: Canadian travellers (n=1,510)

Notes: ¹ Responses as mentioned by the respondents, e.g. , percentage who said "Las Vegas" specifically

A1. In general, when you think of vacation/pleasure travel, which destinations come to mind?

Unaided Destination Awareness – Regions

Regional roll-up¹



US destinations are top of mind for Canadian travellers

- Driven by some “sun states” and other popular destinations such as New York and Las Vegas, the US is the most popular region for vacation trips, with almost 6 in 10 Canadians favouring it as a place to go
- Canada is tied for second with Europe, with 38% of travellers choosing these regions for a vacation trip
- Destinations in the Caribbean and Mexico round out the top 5 top-of-mind travel regions

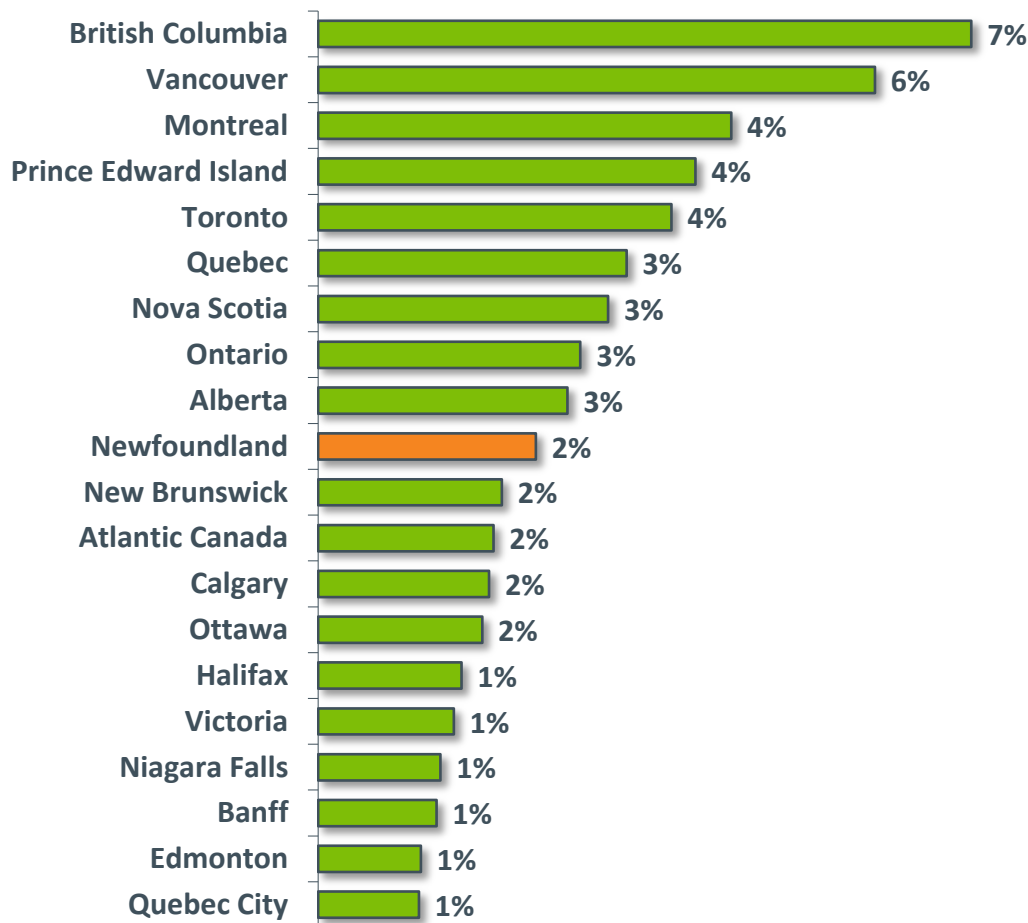
Base: Canadian travellers (n=1,510)

¹ Roll-up of destination mentions by region, e.g., percentage who said “Canada” or any destination in that region

A1. In general, when you think of vacation/pleasure travel, which destinations come to mind?

Unaided Destination Awareness – Canada

Top 20 Canadian destinations¹



BC is Canadian travellers' premier destination for vacation trips in Canada

- BC (general) and Vancouver specifically are by far the top-of-mind vacation destinations in Canada
- The multitude and close ranking of other vacation destinations indicates that travel interests are varied and that the country has something to offer for everyone
- “Newfoundland” ranks in the middle of the pack, topping iconic destinations such as Ottawa, Niagara Falls and Quebec City

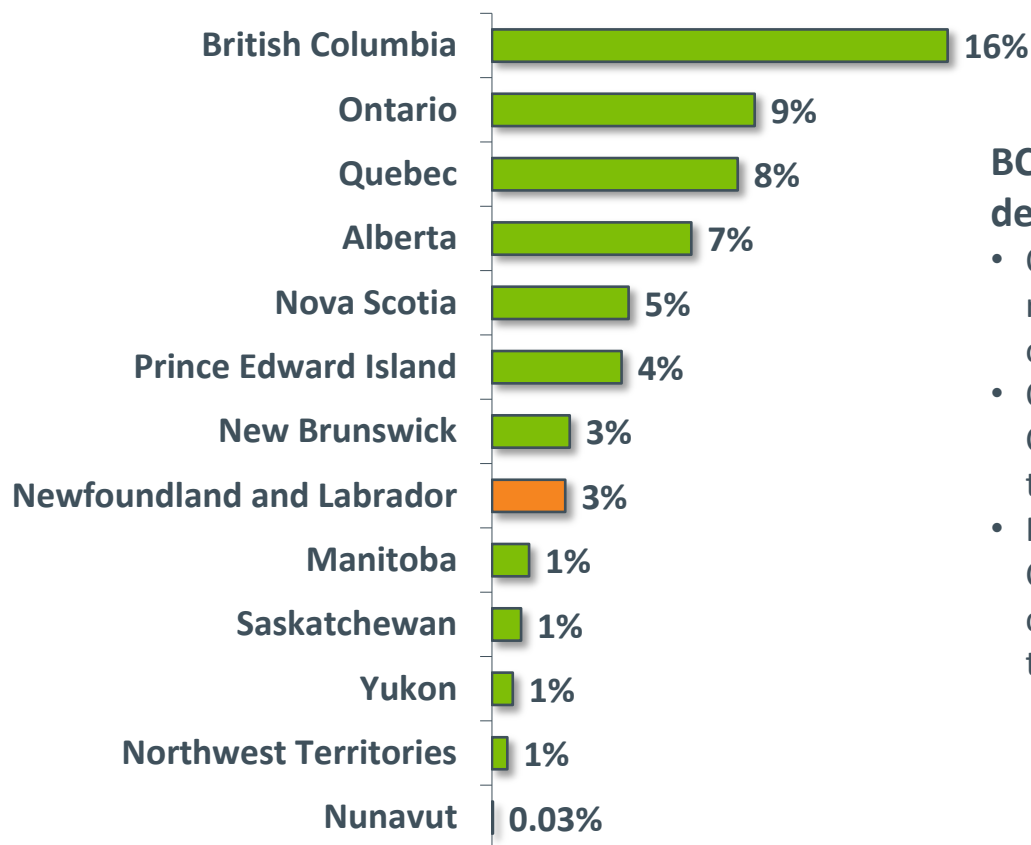
Base: Canadian travellers (n=1,510)

Notes: ¹ Responses as mentioned by the respondents, e.g. , percentage who said “Ottawa” specifically

A1. In general, when you think of vacation/pleasure travel, which destinations come to mind?

Unaided Destination Awareness – Canadian Provinces

Provincial roll-up¹



BC is Canadian travellers' premier destination for vacation trips

- On a provincial basis, destinations in BC out-rank by far all other provinces as the top top-of-mind vacation spot in Canada
- ON, QC and AB will continue to be among Canadians' top vacation spots as they were in the past
- NL's ranking is similar to the other Atlantic Canadian provinces and shows that the competition for mindshare among Canadian travellers remains tough for this province

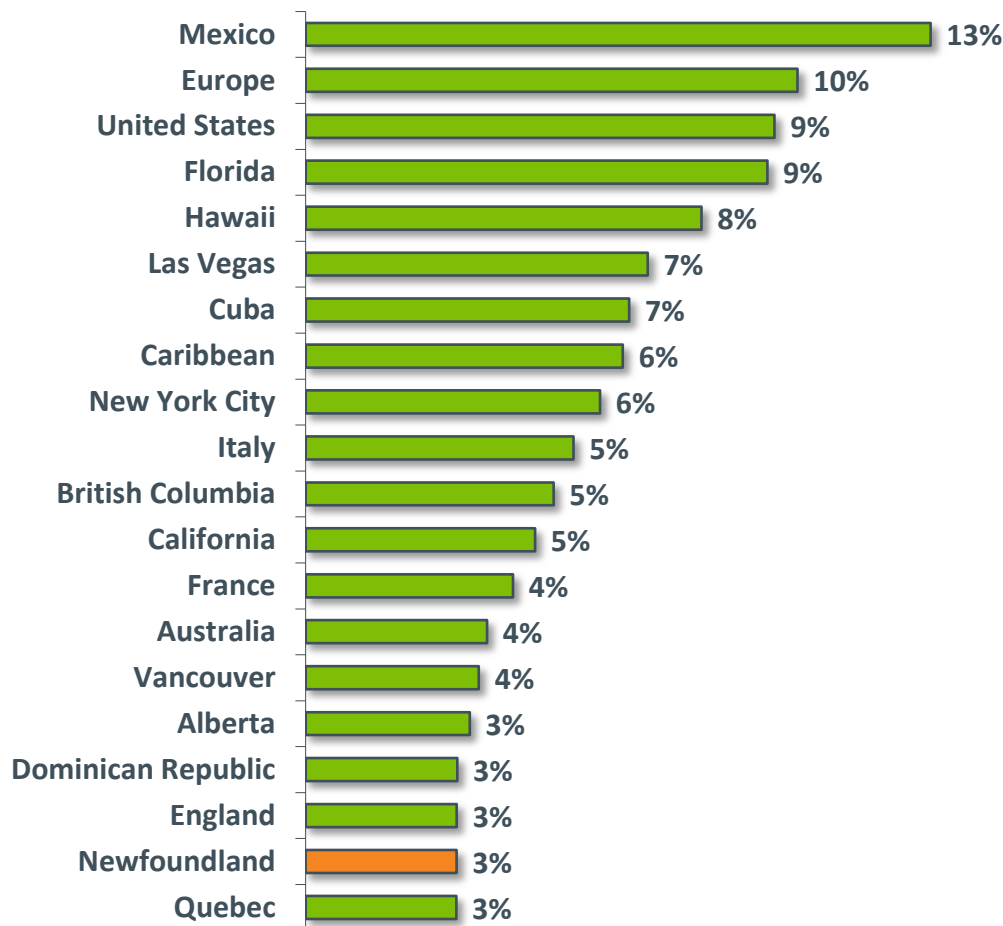
Base: Canadian travellers (n=1,510)

¹ Roll-up of destination mentions by province/territory, e.g., percentage who said "Ontario" or any destination in that region.

A1. In general, when you think of vacation/pleasure travel, which destinations come to mind?

Unaided Destination Consideration

Top 20 destinations¹



Mexico tops Canadians' consideration for a vacation trip in the short term

- The number of destinations mentioned and the closeness of the rankings show that Canadians have very varied vacation interests
- Mexico, with 13% of all mentions, is the top spot Canadian travellers are seriously considering for a vacation in the next 2 years
- Europe, the US (general) and Florida also garner serious consideration by Canadians with about 1 in 10 mentions
- Among 450+ world-wide destinations which Canadians are seriously considering for a vacation trip, 'Newfoundland' ranks 19th, topping destinations such as Paris, London and Spain

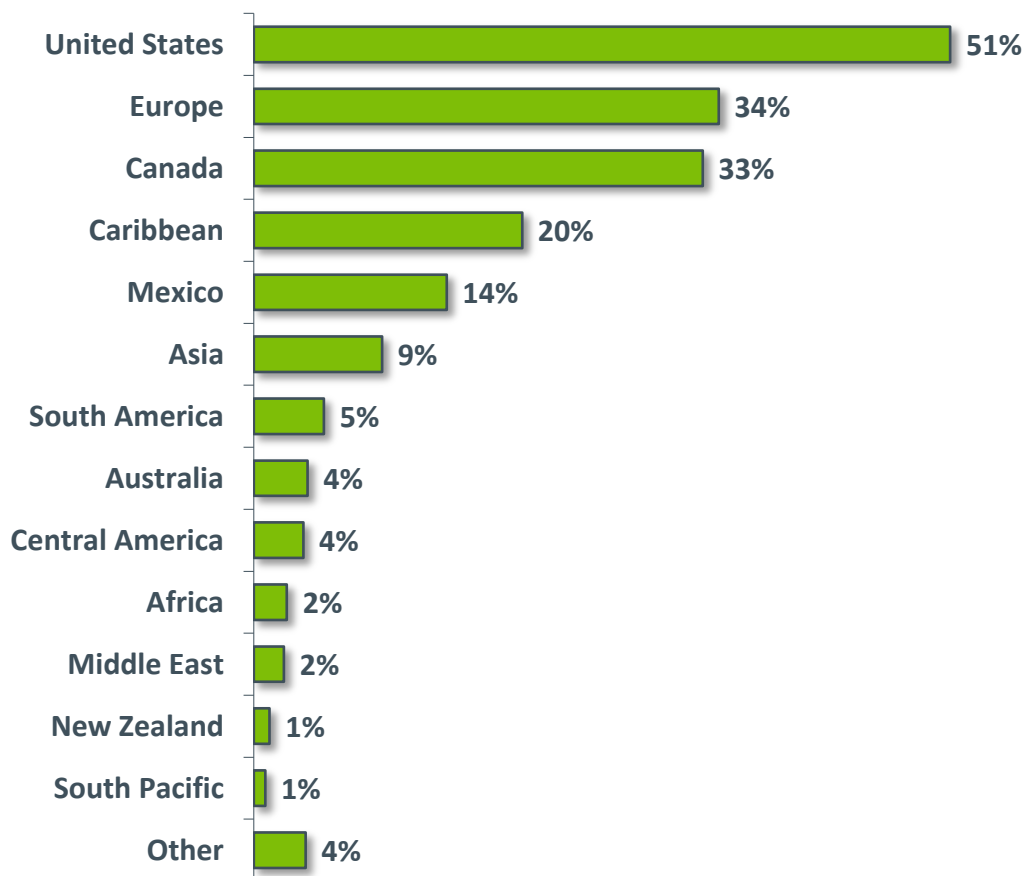
Base: Canadian travellers who indicated they are definitely or very likely to travel in the next year (n=1,177)

Notes: ¹Responses as mentioned by the respondents, e.g., percentage who said "Las Vegas" specifically

A2. Thinking a little further ahead, what destinations are you seriously considering for your trips in the next two years?

Unaided Destination Consideration

Regional roll-up¹



On a regional basis, the US tops Canadians' consideration for a vacation trip in the short term

- More than half of Canadian travellers (51%) are seriously considering the US for a vacation trip in the next 2 years
- Canada faces strong competition from Europe, with 1 in 3 Canadian travellers considering either region for a vacation trip
- Other destinations, including Asia, South America and Australia are considered by fewer than 1 in 10 Canadians
- Canadian travellers' considerations of vacation destinations for the next two years are very reflective of their travels over the past 3 years

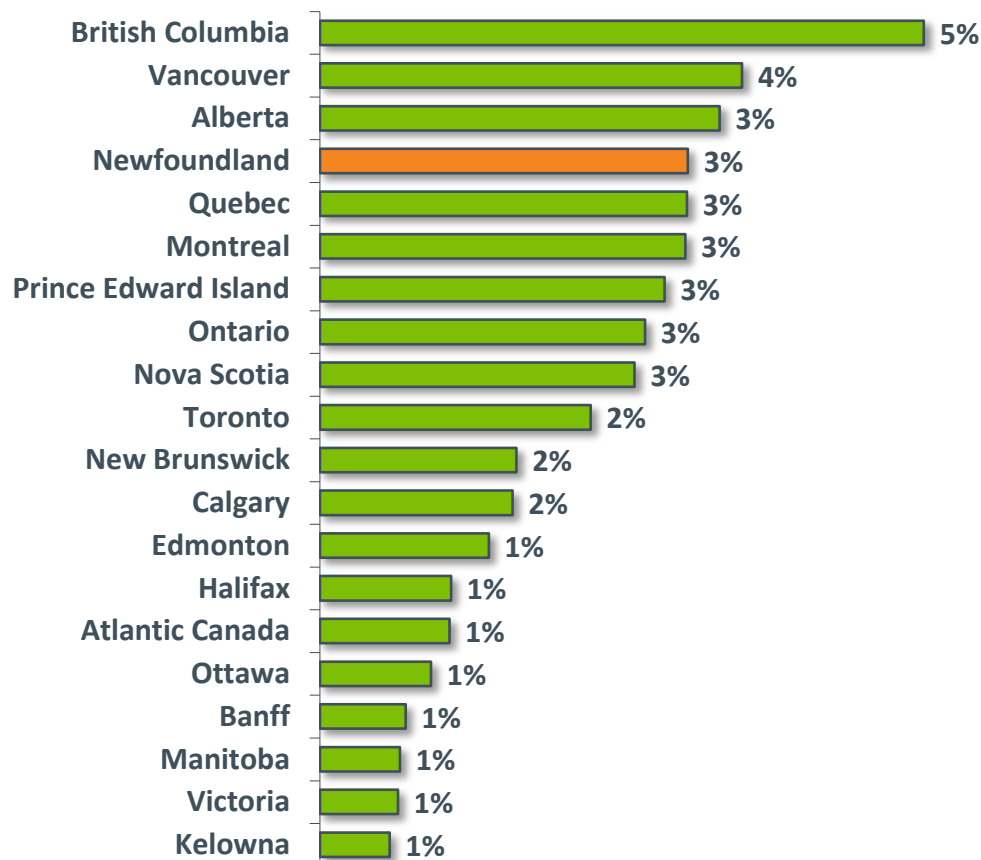
Base: Canadian travellers who indicated they are definitely or very likely to travel in the next year (n=1,177).

¹Roll-up of destination mentions by region, e.g., percentage who said Europe or any destination in that region.

A2. Thinking a little further ahead, what destinations are you seriously considering for your trips in the next two years?

Unaided Destination Consideration – Canada

Top 20 Canadian destinations¹



BC is dominating as a travel destination under consideration for vacation trips by Canadians

- Closeness of consideration levels of various destinations indicates varied interests among Canadian travellers
- Also implies tough competition among destinations to get on travellers' consideration list
- 'Newfoundland' ranks highly among Canadian destinations, topping favourites such as Montreal, PEI and Toronto

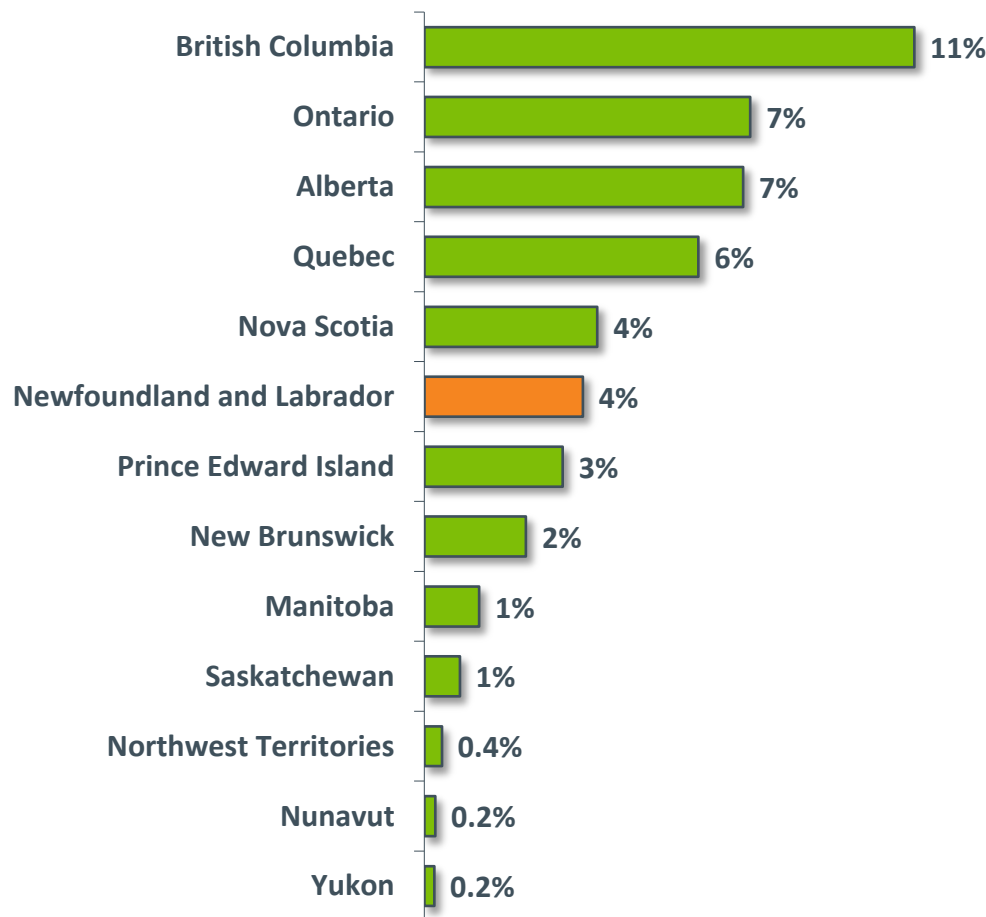
Base: Canadian travellers who indicated they are definitely or very likely to travel in the next year (n=1,177)

Notes: ¹Responses as mentioned by the respondents, e.g. , percentage who said "Las Vegas" specifically

A2. Thinking a little further ahead, what destinations are you seriously considering for your trips in the next two years?

Unaided Destination Consideration – Canadian Provinces

Provincial roll-up¹



BC is dominating as a travel destination under consideration for vacation trips by Canadians

- With 11% of Canadian travellers considering a vacation trip to BC in the short term, BC will remain the country's premier vacation destination
- ON, AB and QC will also continue to be popular vacation destinations as they have been in the past
- NL ranks similarly as the other Atlantic Canada provinces

Base: Canadian travellers who indicated they are definitely or very likely to travel in the next year (n=1,177).

¹Roll-up of brand mentions by region, e.g., percentage who said Newfoundland and Labrador or any destination in that region.

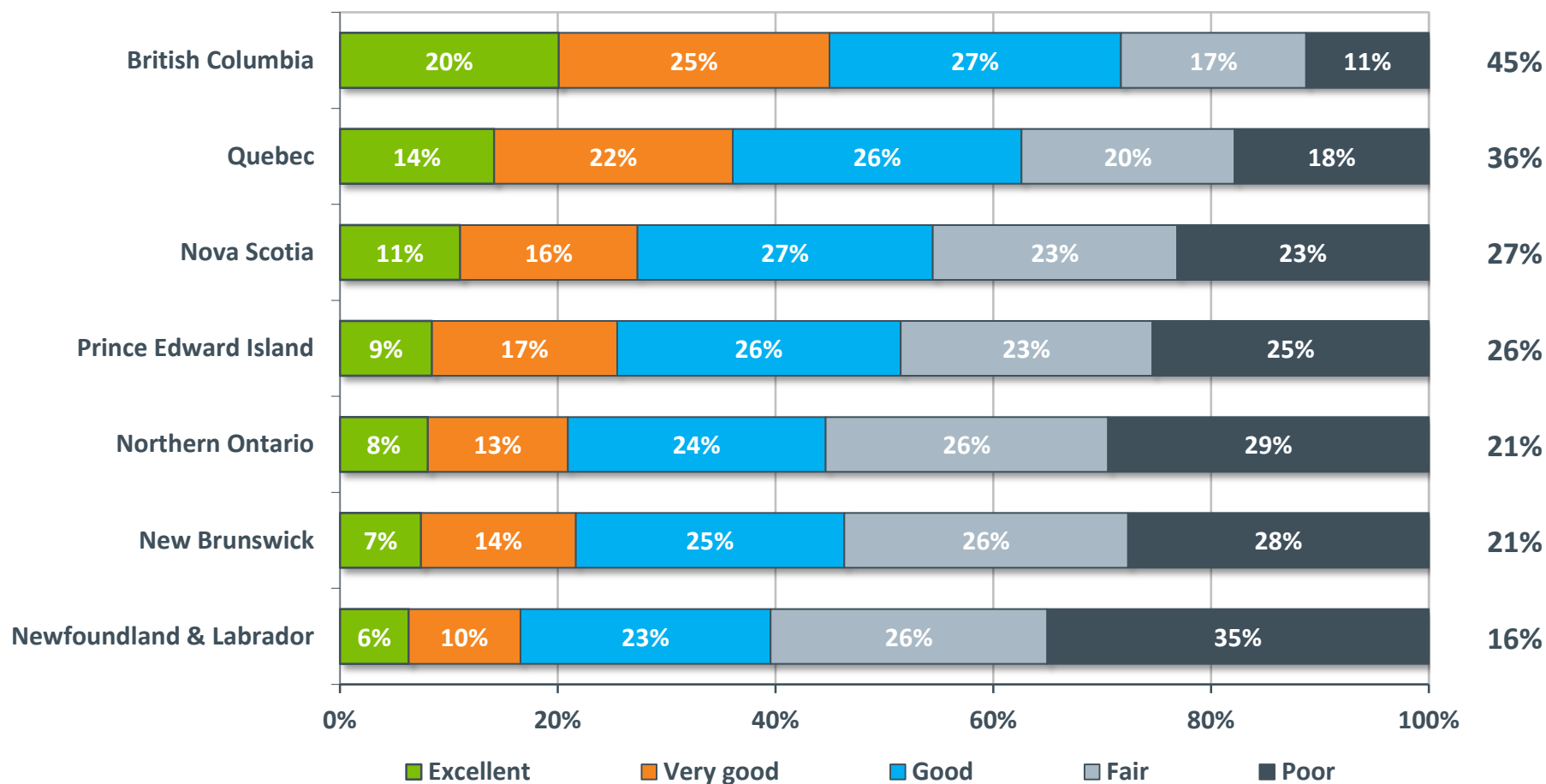
A2. Thinking a little further ahead, what destinations are you seriously considering for your trips in the next two years?

Aided Destination Knowledge

- When asked about their knowledge of vacation travel opportunities in specific Canadian destinations, Canadian travellers appear to be most familiar with opportunities in British Columbia and Quebec
 - 45% (BC) and 36% (QC) of Canadian travellers respectively rated their knowledge of travel opportunities in these two provinces as 'excellent' or 'very good'
 - This can likely be related to the fact that many Canadians have already visited these provinces on a previous vacation trip and/or are considering them for a vacation trip in the next two years
- Canadians appear less familiar with opportunities in other destinations, including Atlantic Canada and Northern Ontario
- With respect to travel opportunities in Atlantic Canada, Canadian travellers are more familiar with Nova Scotia (27% rating their knowledge as 'excellent' or 'very good') and PEI (26%), followed by New Brunswick (21%) and Newfoundland and Labrador (17%)
 - Likely due to the fact that the region has been visited by fewer Canadians in the past and is also lower on Canadians' consideration list than Canada's most popular vacation destinations
- Knowledge of travel opportunities in the listed destinations is generally similar across age groups, however, 18-34 year olds indicate above average knowledge of opportunities in Northern Ontario while 55+ year olds are much more likely to claim very good knowledge of travel opportunities in Nova Scotia
- Residents of AB are highly familiar with BC, with 70% of these travellers claiming very good knowledge of their neighbour to the west while not quite half of residents of MB and SK (45%) are second most familiar with BC compared to travellers from other provinces
 - Outside of their own region/province, residents of BC are most familiar with NS (20%) while Maritimers claim the same for QC (31%). Quebecers have better knowledge of BC (36% rating at least "very good") than any other destination
 - Ontarians are the most likely to claim very good knowledge about Quebec (36%)

Aided Destination Knowledge

Top 2 Box¹



Note: indicated knowledge levels are impacted by the fact that responses for all destinations with the exception of NL include local residents while responses for NL include only non-residents

Base: Canadian travellers (n=1,510).

Note:¹Top 2 Box refers to a rating of 'Excellent' or 'Very good' on a 5-point excellence scale.

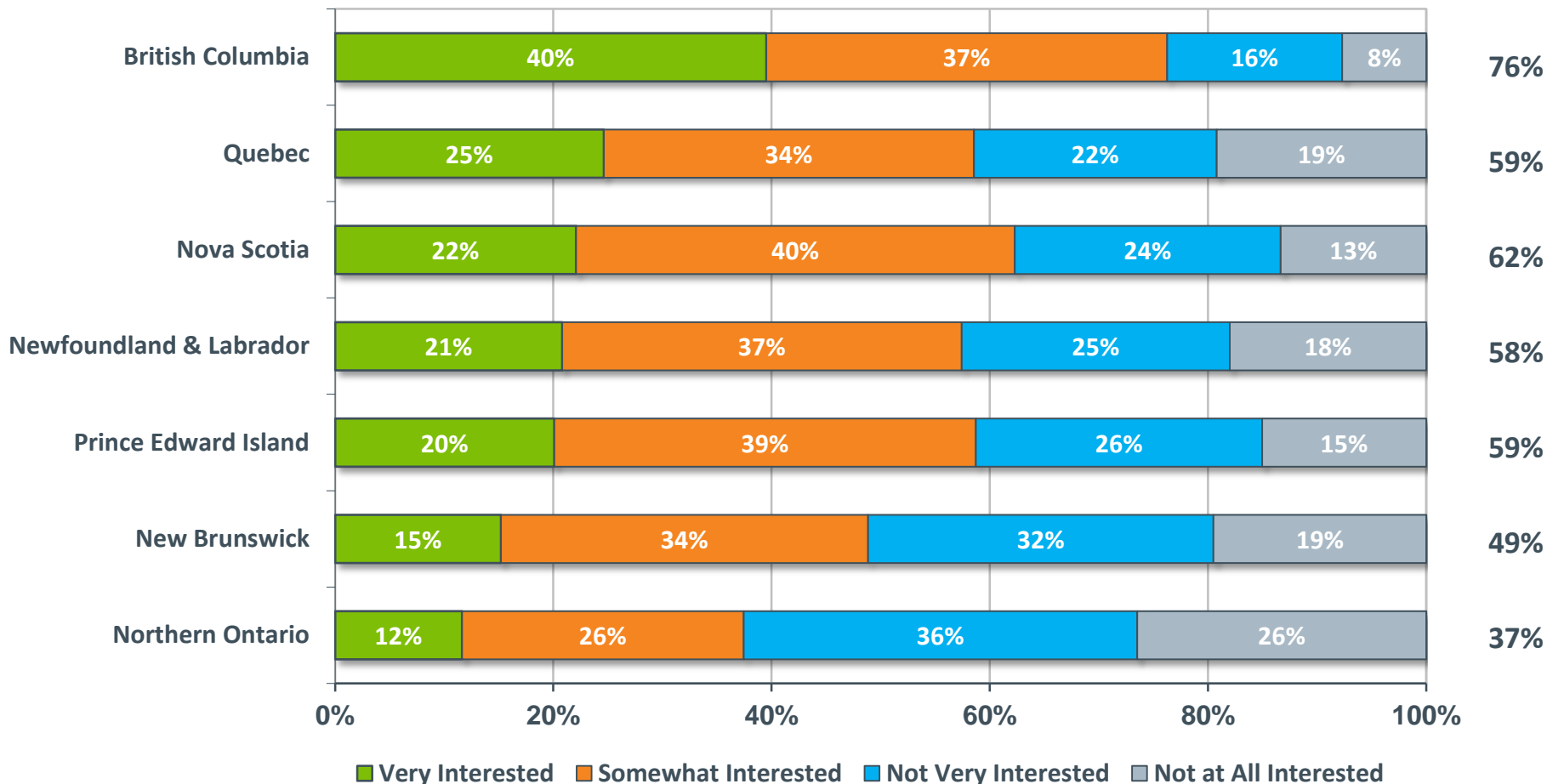
A3. How would you rate your level of knowledge of vacation/pleasure travel opportunities in each of the following destinations?

Aided Destination Interest (Next Two Years)

- When asked about their interest in taking a vacation trip to specific Canadian destinations in the next 2 years, Canadian travellers show particularly high levels of interest in BC
 - Three quarters of Canadians (76%) are at least 'somewhat interested', with 45% being 'very interested'
 - This is consistent with other survey findings, confirming BC's position as a premier vacation destination for Canadians within Canada
- More than half of Canadians are also at least 'somewhat interested' in other destinations, including NS (62%), QC (59%), PEI (59%) and NL (58%)
 - Given the closeness of results for these destinations, Canadians appear to be equally interested in various destinations when it comes to travelling in their own country
- Comparatively fewer Canadians are interested in a vacation trip to New Brunswick (49%) and Northern Ontario (37%)
- Interest in each destination did not vary much across age groups, however, 35-54 year olds appear to have a slightly greater interest in the Maritimes than other age groups while 18-34 year olds have a much greater interest in travelling to Northern ON than those older than 34
- Interest in specific destinations varies by province of origin
 - Maritimers are likely to stay in their own region, with high interest in travelling in NS (78%) and PEI (77%). Interest is also high to visit BC (72%) and NL (70%)
 - 73% and 68% respectively of Quebecers are at least 'somewhat interested' in visiting their own province and BC
 - Residents of ON are more interested in visiting BC (74%) and NL (67%) than any other province
 - Residents of MB/SK prefer BC (75%) and NS (63%) over other provinces
 - At 92%, almost all travellers from AB are at least 'somewhat interested' in visiting BC
 - At 85%, BC residents show the highest interest in travelling in their own province, while more than half of BC residents are also interested in NL (57%) and NS (57%)

Aided Destination Interest (Next Two Years)

Top 2 Box¹



Base: Canadian travellers (n=1,510)

Note: ¹Top 2 Box refers to a rating of 'Very Interested' or 'Somewhat Interested' on a 4-point Interest scale

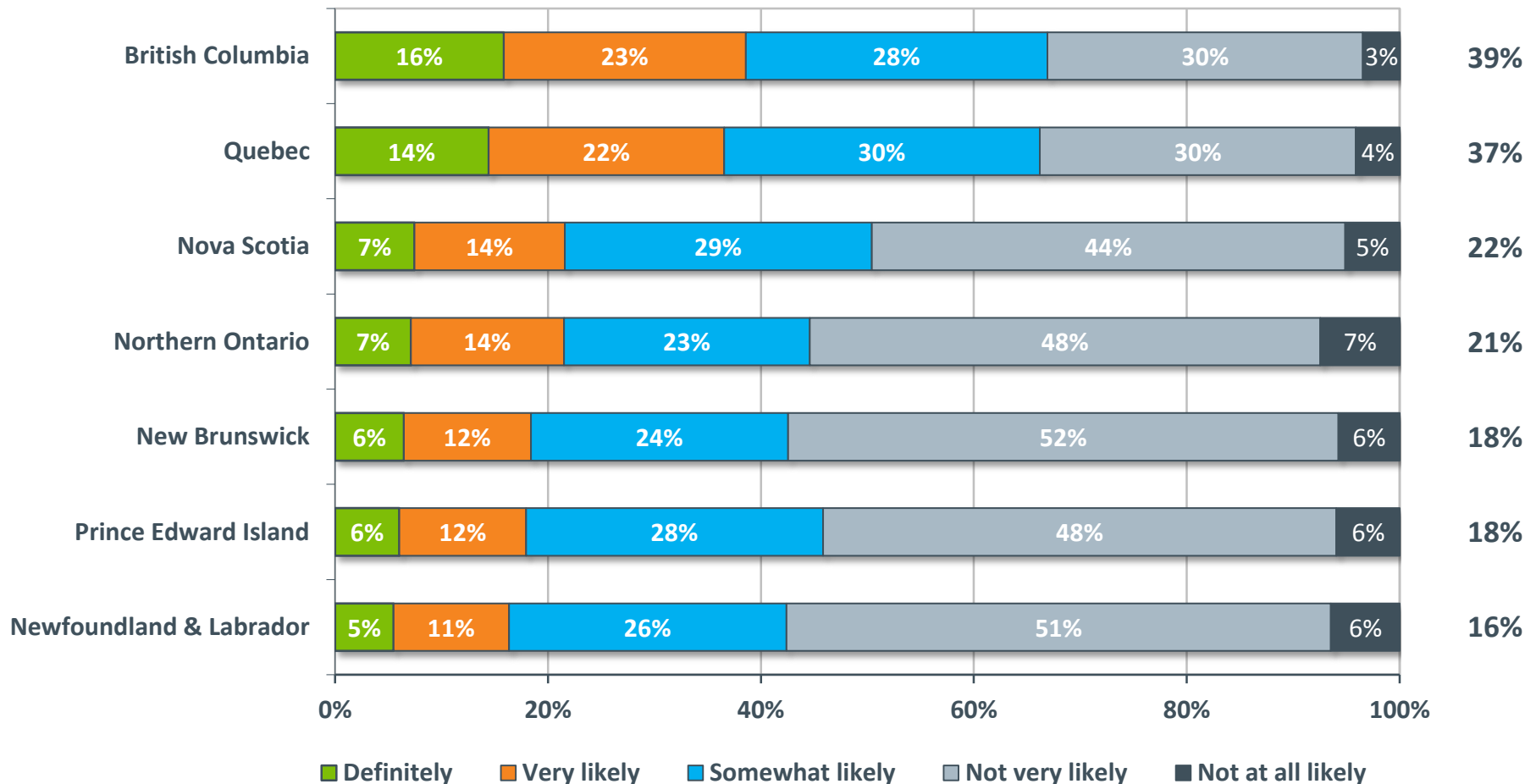
A4. How interested are you in taking a vacation/pleasure trip to each of the following destinations in the **next two years**?

Travel Intentions – Next Five Years

- Consistent with other survey findings, BC also dominates as the travel destination to which Canadians are the most likely to take a vacation trip in the medium term
 - 16% of Canadian travellers indicated they would ‘definitely’ take a vacation trip to BC within the next 5 years
 - In addition, almost a quarter (23%) of Canadian travellers are ‘very likely’ to take a vacation trip to BC within the next 5 years
- Quebec also remains popular with Canadian travellers, with 37% indicating that they would ‘definitely’ or are ‘very likely’ to take a vacation trip to QC in the next 5 years
- Travel intentions to Atlantic Canada as well as Northern ON are well below those to BC and QC, with about 1 in 5 Canadians being at least ‘very likely’ to travel there
- Survey results show that interest in a destination does not necessarily translate into immediate or mid-term travel intentions
 - 3 of the 4 Atlantic Canadian provinces, including NL, have the largest gap (about 40 percentage points) between the percentage of Canadians who are at least ‘somewhat interested’ in taking a vacation trip to the destination (e.g. NL 58%) and the percentage of those who are at least ‘very likely’ to take a vacation to that destination (e.g. NL 16%)
 - Interestingly, this gap is also comparatively high (37 points) for BC and lowest for Northern ON (17 points)
 - The difference between the number of travellers who are interested in visiting a destination versus the number of travellers who intend to travel to that same destination within a 5-year period may speak to the type of destination travellers perceive it as ... the larger the gap, the more likely it is that travellers perceive the destination as a “bucket list” item, “dream vacation” or “some day” destination

Travel Intentions – Next Five Years

Top 2 Box¹



Base: Canadian travellers excluding those who are 'not at all interested' in the destination (BC: n=1394; QC: n=1220; NS: n=1308; NorON: n=1110; NB: n=1216; PEI: n=1283; NL: n=1238)

Note: ¹Top 2 Box refers to a rating of 'Definitely' or 'Very likely' on a 5-point Likelihood scale

A6. And how likely are you to take a vacation/pleasure trip to each of the following destinations in the **next five years**?

Travel Intentions – Next Five Years

Travel intentions to select destinations (next 5 years) by province of origin

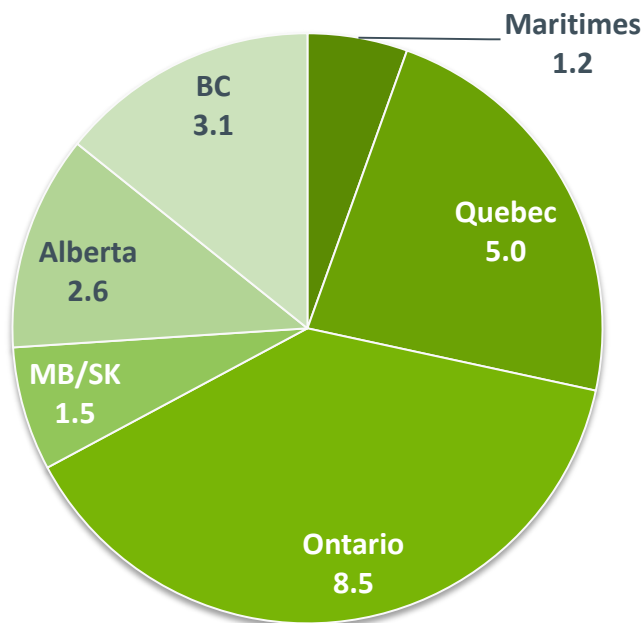
ORIGIN	Maritimes	Quebec	Ontario	MB/SK	Alberta	BC
DESTINATION						
NL	26%	14%	18%	9%	13%	17%
PEI	47%	16%	17%	17%	14%	16%
NS	61%	18%	19%	15%	22%	18%
NB	55%	22%	15%	9%	18%	13%
Northern ON	21%	21%	26%	23%	11%	18%
QC	35%	59%	35%	20%	19%	20%
BC	29%	22%	27%	40%	71%	68%

Geographic location has some influence on travel intentions

- Maritimers are the most likely to visit NL for a vacation trip, followed by residents of Ontario while residents of MB/SK are the least likely to visit NL. This is consistent with the province's traditional main source markets
- Maritimers are also very likely to travel within the Maritimes
- Quebecers and BC residents, by far, are the most likely to travel within their own province
- Ontario residents are most likely to travel to QC compared to other destinations
- Residents of western Canada are by far the most likely to take a vacation trip to BC

Size of the Potential Canadian Market to NL

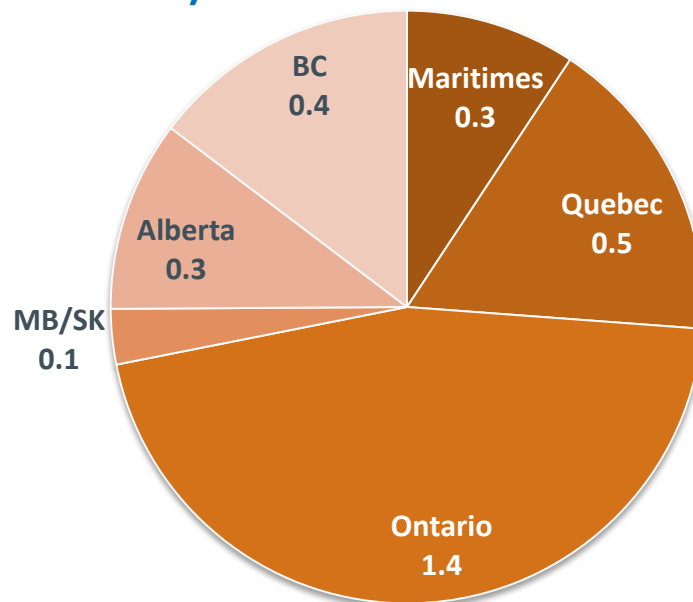
Canadian Travellers – Market Size (million travellers)



- 22 million potential travellers in Canada
- Largest source markets are Ontario and Quebec, representing over half of Canada's travel market (39% and 23% respectively)

Canadian Travellers – Market Size for Newfoundland and Labrador¹ (million travellers)

Note: ¹Based on 5-year travel intentions



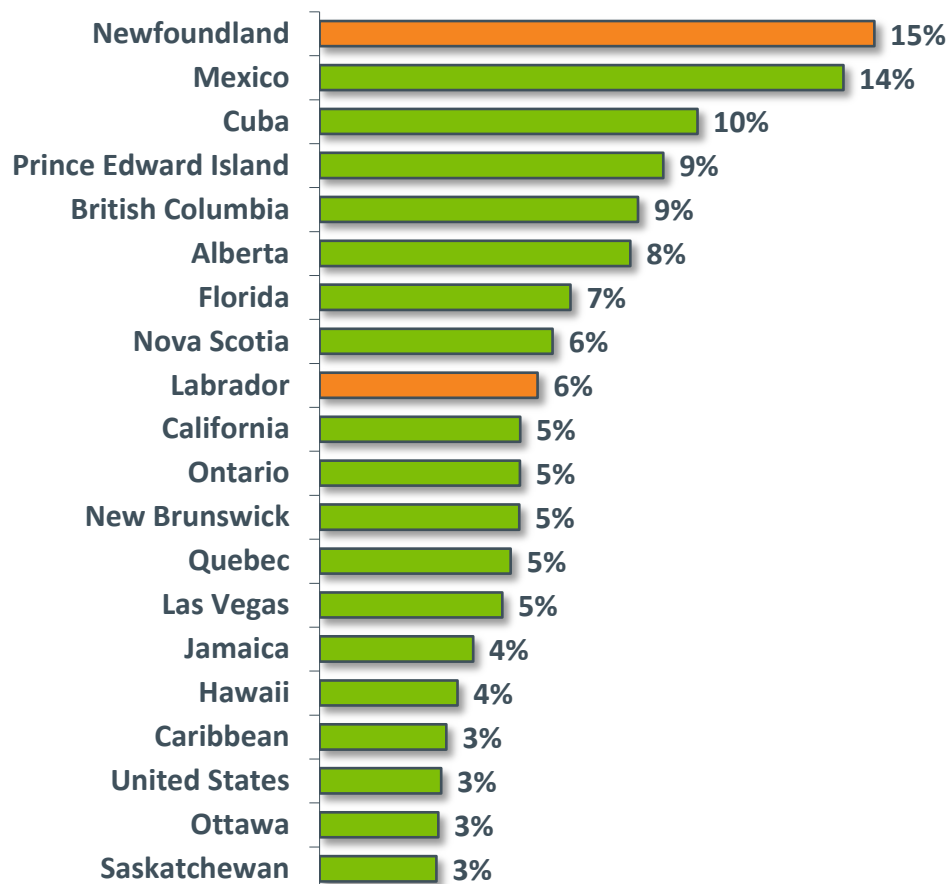
- Based on stated travel intentions (definitely or likely to visit), there are close to 3 million Canadian travellers who may visit Newfoundland and Labrador
- At 1.4 million, ON represents the largest potential source market, nearly 3 times bigger than the next largest market (QC)



3 - Advertising Awareness for Canadian Travellers

Unaided Advertising Awareness

Top 20 destinations¹



High advertising recall for Newfoundland and Labrador

- Newfoundland and Labrador enjoys high advertising awareness levels, coming in as the top destination for which Canadians recall travel ads on an unaided basis
 - The province received 15% of destination mentions for which Canadian travellers recalled advertising
 - In addition, Labrador received 6% of mentions
- The advertising awareness level for Newfoundland and Labrador is well above that for other vacation destinations, including those which are being seriously considered for a vacation trip by Canadian travellers (e.g. Mexico, Florida, California, Hawaii)

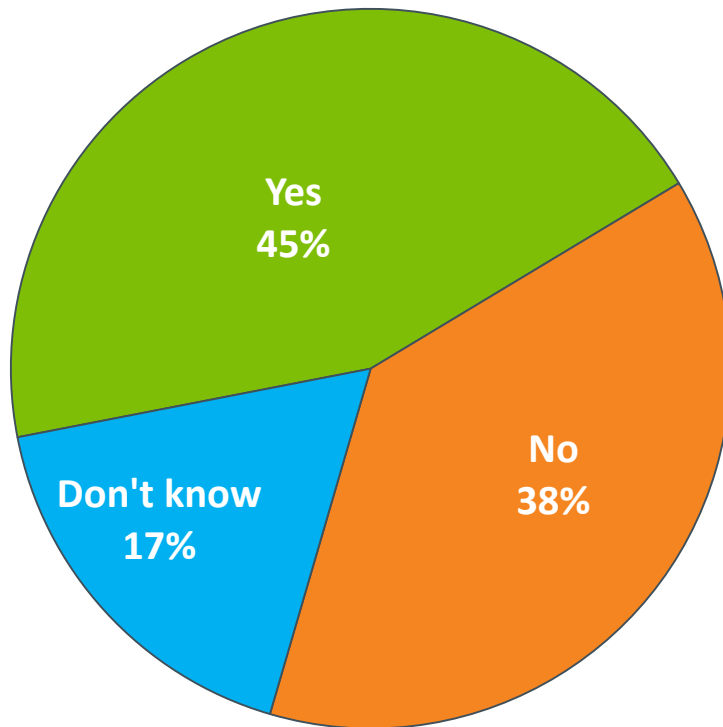
Base: Canadian travellers (n=1,510)

Notes: ¹Responses as mentioned by the respondents, e.g. , percentage who said “Las Vegas” specifically

B1. And now, thinking about travel or vacation advertising you may have seen or heard in the past 12 months, which destinations come to mind?

Aided Advertising Awareness for Newfoundland and Labrador

Canadian travellers who have seen or heard advertising for the province



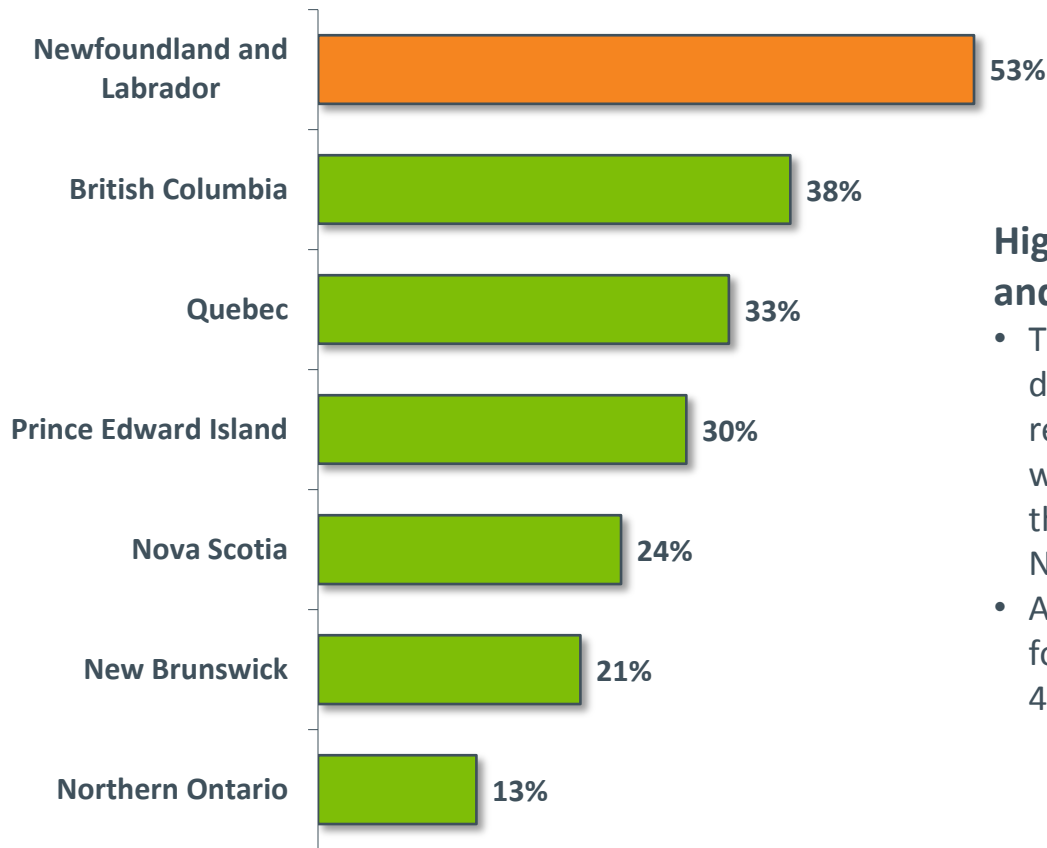
High advertising recall for Newfoundland and Labrador

- When asked specifically whether they had seen or heard any advertising for Newfoundland and Labrador, almost half of Canadian travellers (45%) said “Yes”, 38% said “No” and 17% didn’t know
- The vast majority of those who have seen or heard NL advertising, became aware of it through TV (87%) while 20% came across it in a print magazine
- For about 1 in 10, a printed newspaper (12%) or online (11%) were the sources of the ads they had seen

Base: Canadian travellers (n=1,510)

D2A. In the past 12 months, have you seen or heard any advertising for Newfoundland and Labrador?

Total Advertising Awareness for Canadian Destinations



High advertising recall for Newfoundland and Labrador

- The province, compared to other specific destinations in Canada, scored the highest result in terms of total advertising awareness, with 53% of Canadian travellers indicating that they had seen or heard advertising for Newfoundland and Labrador
- Among other destinations, tourism advertising for BC, QC and PEI garnered the attention of 3-4 in 10 Canadian travellers

Base: Canadian travellers (n=1,510).

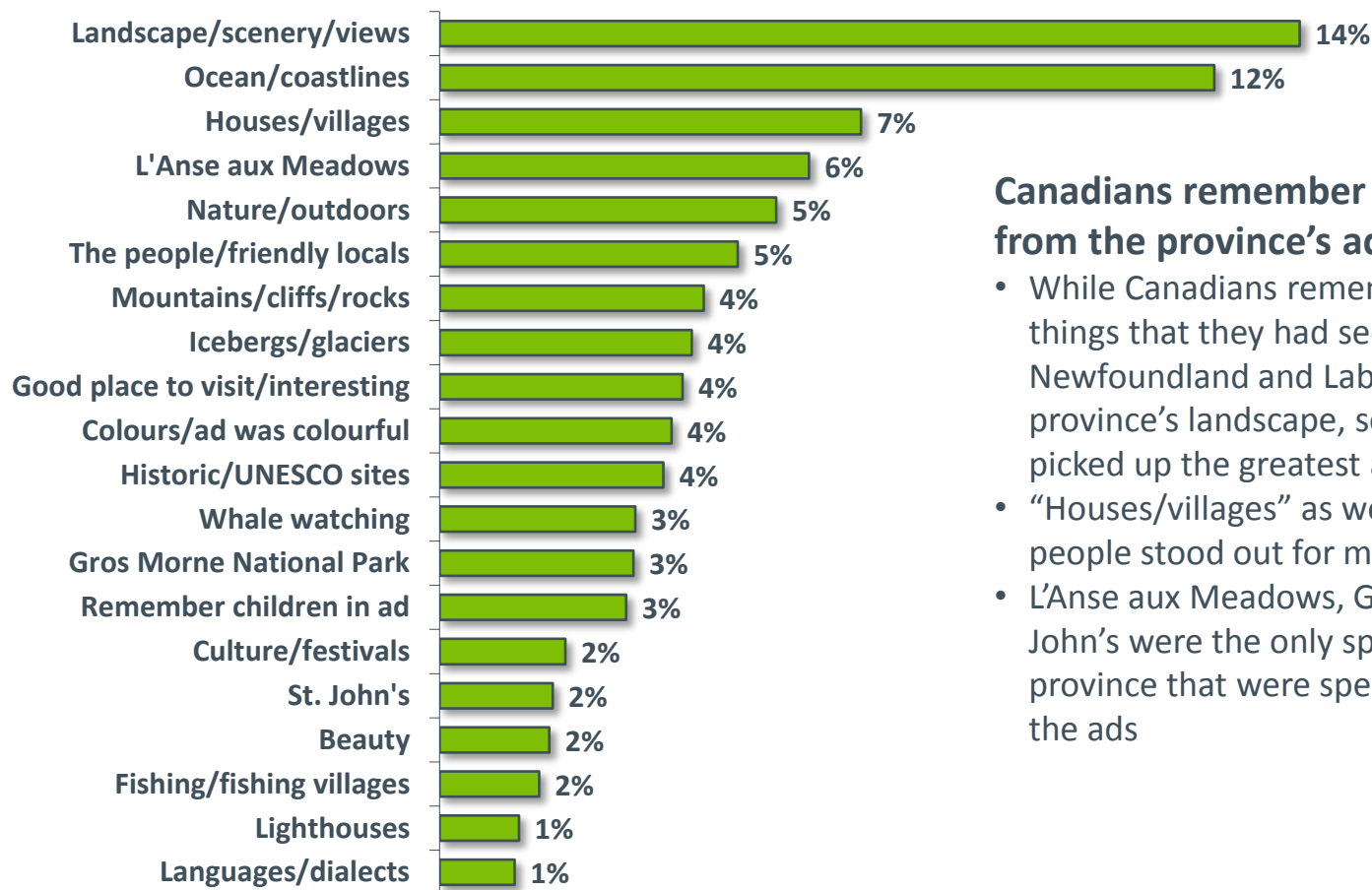
B1. And now, thinking about travel or vacation advertising you may have seen or heard in the past 12 months, which destinations come to mind?

B2. For which of the following destinations have you seen or heard advertising in the past 12 months?

D2A. In the past 12 months, have you seen or heard any advertising for Newfoundland and Labrador?

Advertising Recall for Newfoundland and Labrador

Advertising features recalled – top 20 mentions



Canadians remember a variety of things from the province's ads

- While Canadians remembered a number of things that they had seen or heard in Newfoundland and Labrador's advertising, the province's landscape, scenery and coastlines picked up the greatest attention
- "Houses/villages" as well as nature and the people stood out for many
- L'Anse aux Meadows, Gros Morne and St. John's were the only specific locations in the province that were specifically recalled from the ads

Base: Canadian travellers who have seen or heard any advertising about Newfoundland and Labrador (n=671)

D2B. What specifically do you remember about the advertising you saw or heard?

Impact of Advertising Awareness

Interest in and likelihood to travel to NL by advertising awareness

	All Travellers (n=1,510)	Saw/heard advertising for NL (n=796)	Did not see/hear advertising for NL (n=714)
Interested in visiting (next two years)	57%	67%	47%
Likelihood of visiting (next two years)	16%	17%	8%
Likelihood of visiting (next five years)	16%	18%	8%

Advertising creates market momentum

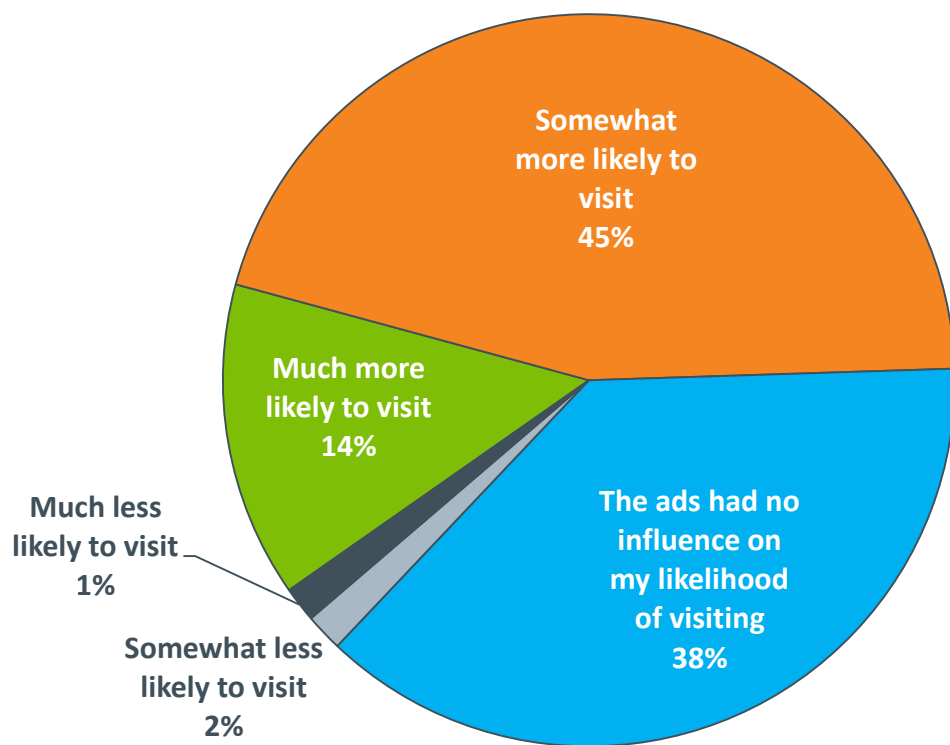
- Canadian travellers **who have seen or heard** tourism advertising for Newfoundland and Labrador are significantly more interested in visiting the province (67%) than those who haven't seen or heard any advertising (47%)
- With 17-18% indicating that they will 'definitely' or 'very likely' visit the province, those aware of advertising are also more than twice as likely to visit the province in the next 2 to 5 years than those who are not aware of any advertising

Base: Canadian travellers (n=1,510).

Notes: Results shown are Top 2 Box scores (very interested & somewhat interested; definitely & very likely to travel to destination)

Impact of Advertising Awareness

Advertising impact on travel motivation



Advertising positively impacts travel motivation

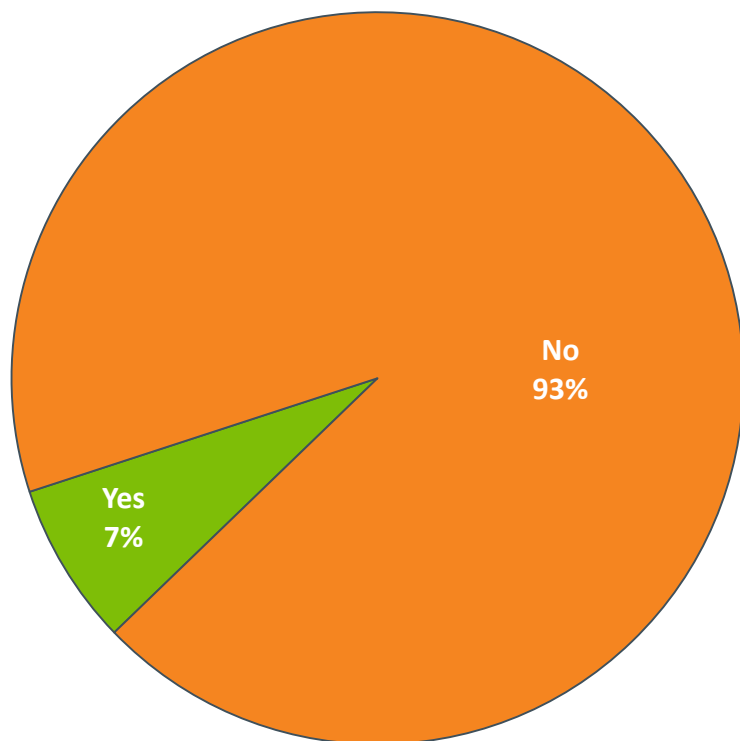
- 14% of Canadian travellers who had seen or heard advertising for NL felt that they were “much more likely” to travel to the province in the next 2 years after seeing or hearing the advertising
- An additional 45% indicated that they were “somewhat more likely” to visit the province after seeing or hearing the advertising
- Survey results show that being aware of tourism advertising for NL had a positive motivational impact on almost 6 in 10 Canadian travellers

Base: Canadian travellers who have seen or heard any advertising about Newfoundland and Labrador (n=671)

D3B. After seeing or hearing the advertising for Newfoundland and Labrador, did your likelihood of visiting the Newfoundland and Labrador in the **next two years** change? Would you say that the advertising made you...

Impact of Advertising Awareness

Taken a trip after seeing or hearing NL advertising



Advertising positively impacts travel decisions

- Nearly 1 in 10 Canadian travellers indicated that they had taken a vacation trip to the province after seeing or hearing advertising for Newfoundland and Labrador
- 4% of Canadian travellers who **were NOT previously planning** a trip, indicated that they had taken a vacation trip to the province after seeing or hearing advertising for Newfoundland and Labrador,

Base: Canadian travellers who have seen or heard any advertising about Newfoundland and Labrador (n=671)

D3C. And since seeing or hearing the advertising have you taken or booked a vacation/pleasure trip to Newfoundland and Labrador?

The background features several thin, light green wavy lines that sweep across the top half of the slide. The bottom half is dominated by thick, overlapping bands of various shades of green, ranging from a pale lime to a deep forest green, creating a sense of movement and depth.

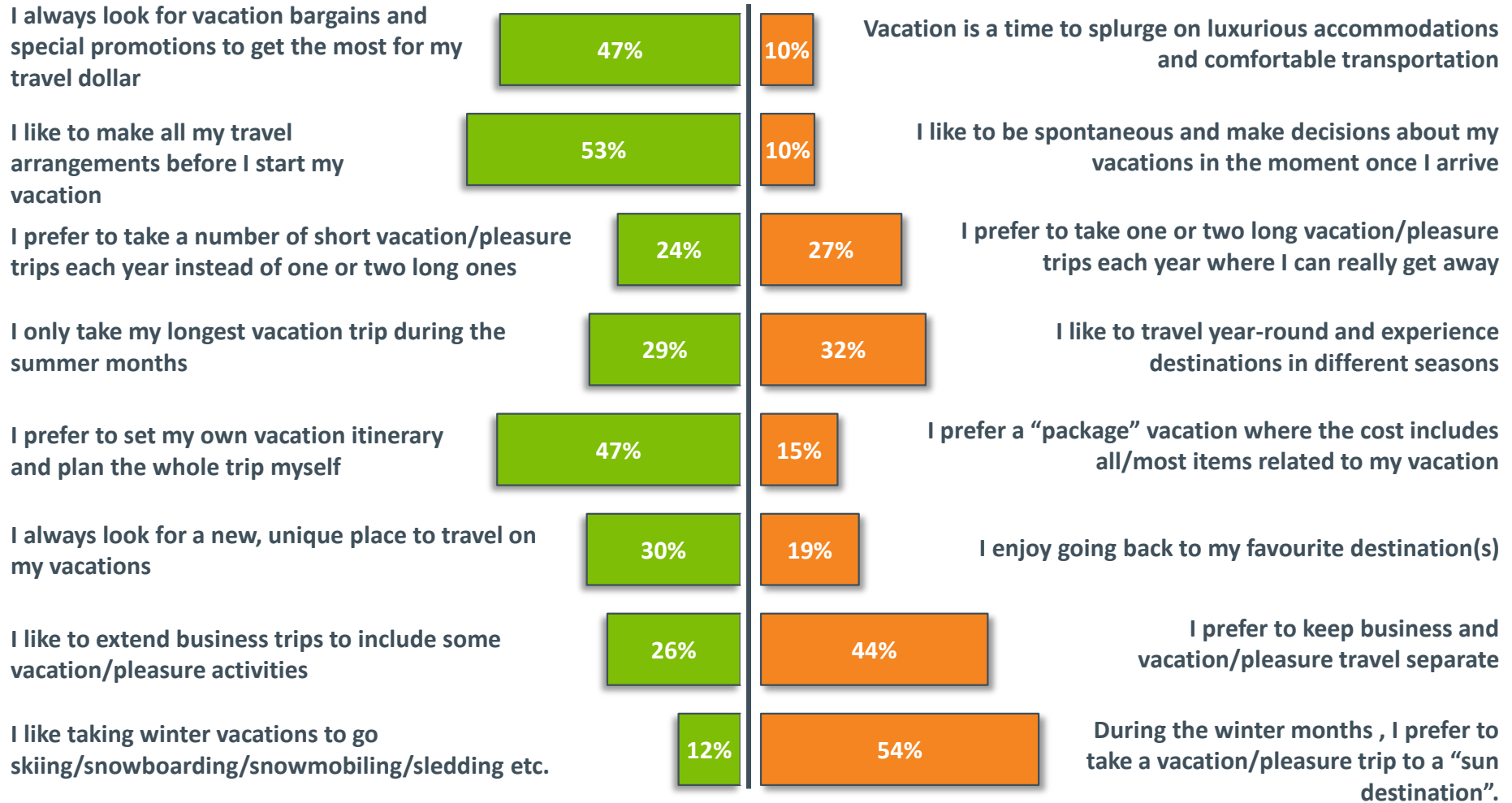
4 – Travel Attitudes and Motivations among Canadian Travellers

Travel Preferences

Canadian travellers have diverse travel preferences

- The survey results revealed insights into vacation travel preferences of Canadians
- Pairs of statements were presented on opposite ends of a continuum and travellers were asked to indicate which statement best represented their preferences
- The graphic presents the proportion of travellers who indicated that their preferences sit at one or the other end of the continuum
- When it comes to vacation travel, Canadians show some definite preferences:
 - Canadians tend to be “snow birds”, with over half (54%) seeking “sun destinations” for vacation travel during the winter months while only 12% are into real winter vacations with skiing or snowboarding
 - Also over half of Canadian travellers (53%) like to make their travel arrangements in advance rather than making spontaneous decision at the destination (10%)
 - Similarly, travellers prefer to set their own itinerary (47%) as opposed to taking all-inclusive package vacations (15%)
 - Canadian travellers have a definite preference for travel deals, with 47% indicating that they look for bargains and specials rather than splurge (10%)
 - Canadians also mainly like to keep business and pleasure travel separate (44%) and prefer new, unique destinations (30%) over going back to a favourite place (19%)
- Canadians didn’t show any particular preference towards taking one or two long vacations (27%) versus taking several shorter trips (24%) or taking summer vacations only (29%) versus travelling year round (32%)
- Survey results show that Canadian travellers are diverse and that they can be enticed by a variety of travel options that cater to their preferences

Travel Preferences



Base: Canadian travellers (n=1,510), % providing a Top 3 rating for each

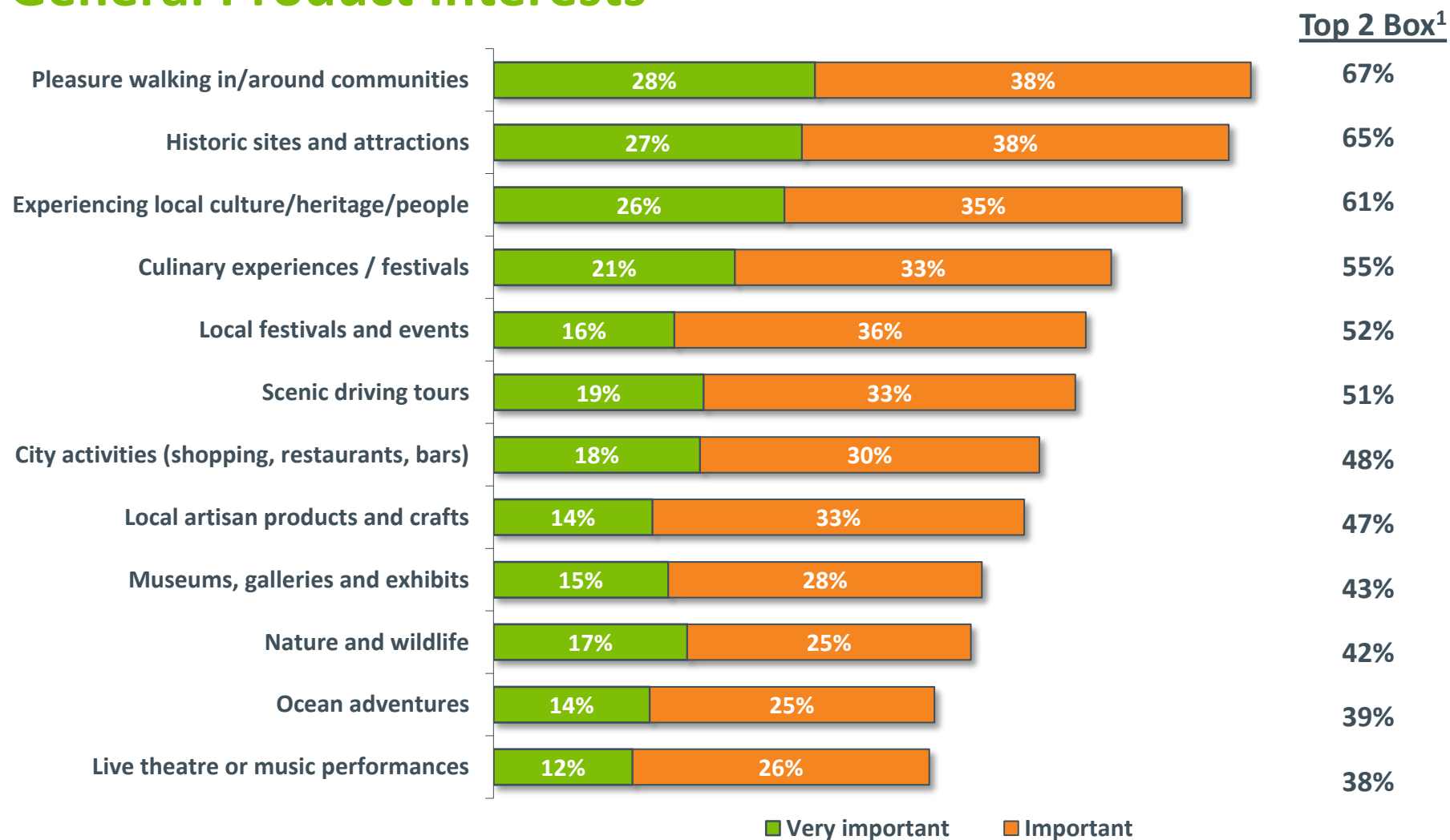
C1. Listed below are pairs of statements that pertain to **travel preferences and behaviours**. For each pair, use the slider to indicate where your preferences sit between the two statements.

General Product Interests

Canadians look for experiences that connect them with the destination

- There is a diverse range of experiences that are important to Canadian travellers when they decide on a vacation travel destination
- Pleasure walking (67%), history (65%), local culture and heritage/connecting with locals (61%) top their list of interests and are important to a majority of travellers
- Other experiences that connect travellers with the destination rank high on the importance list, including culinary experiences (54%), local events and festivals (52%) and local artisan products and crafts (47%)
- Also of importance to many travellers are scenic driving tours (52%) and city activities (48%)
- Also resonating with more than 4 in 10 Canadian travellers are museums and galleries (43%) as well as nature and wildlife (42%)
- There is great potential for enticing travellers with Newfoundland and Labrador as it has to offer what travellers are looking for
- Most importantly, the travel experiences Canadian travellers are seeking the most are those that connect them with the destination
 - Newfoundland and Labrador is very well positioned with the distinct and unique local “flavour” or “personality” that it can offer
 - The province can also take advantage of the fact that it is a vacation destination which travellers would favour over some other Canadian destinations for ocean adventures, experiencing local culture, UNESCO heritage sites, nature and wildlife, hiking and fishing

General Product Interests



Base: Canadian travellers (n=1,510)

Note: ¹Top 2 Box refers to a rating of 'Very Important' or 'Important' on a 5-point importance scale.

C2. We are interested in knowing what you are looking for in a vacation/pleasure trip. Please indicate how important each one is to you personally, when deciding on a destination for a vacation/pleasure trip.

General Product Interests

Activity / Experience	Level of importance (Top 2 box ¹)	
	Canadian travellers (n=1510)	Interested in Newfoundland and Labrador (n=823)
Pleasure walking in/around communities	67%	71%
Historic sites and attractions	65%	69%
Experiencing local culture/heritage/people	61%	66%
Culinary experiences / festivals	55%	59%
Local festivals and events	52%	58%
Scenic driving tours	51%	57%
City activities (shopping, restaurants, bars)	48%	49%
Local artisan products and crafts	47%	51%
Museums, galleries and exhibits	43%	48%
Nature and wildlife	42%	48%
Ocean adventures	39%	46%
Live theatre or music performances	38%	44%

Higher interest in activities and experiences among those interested in visiting NL

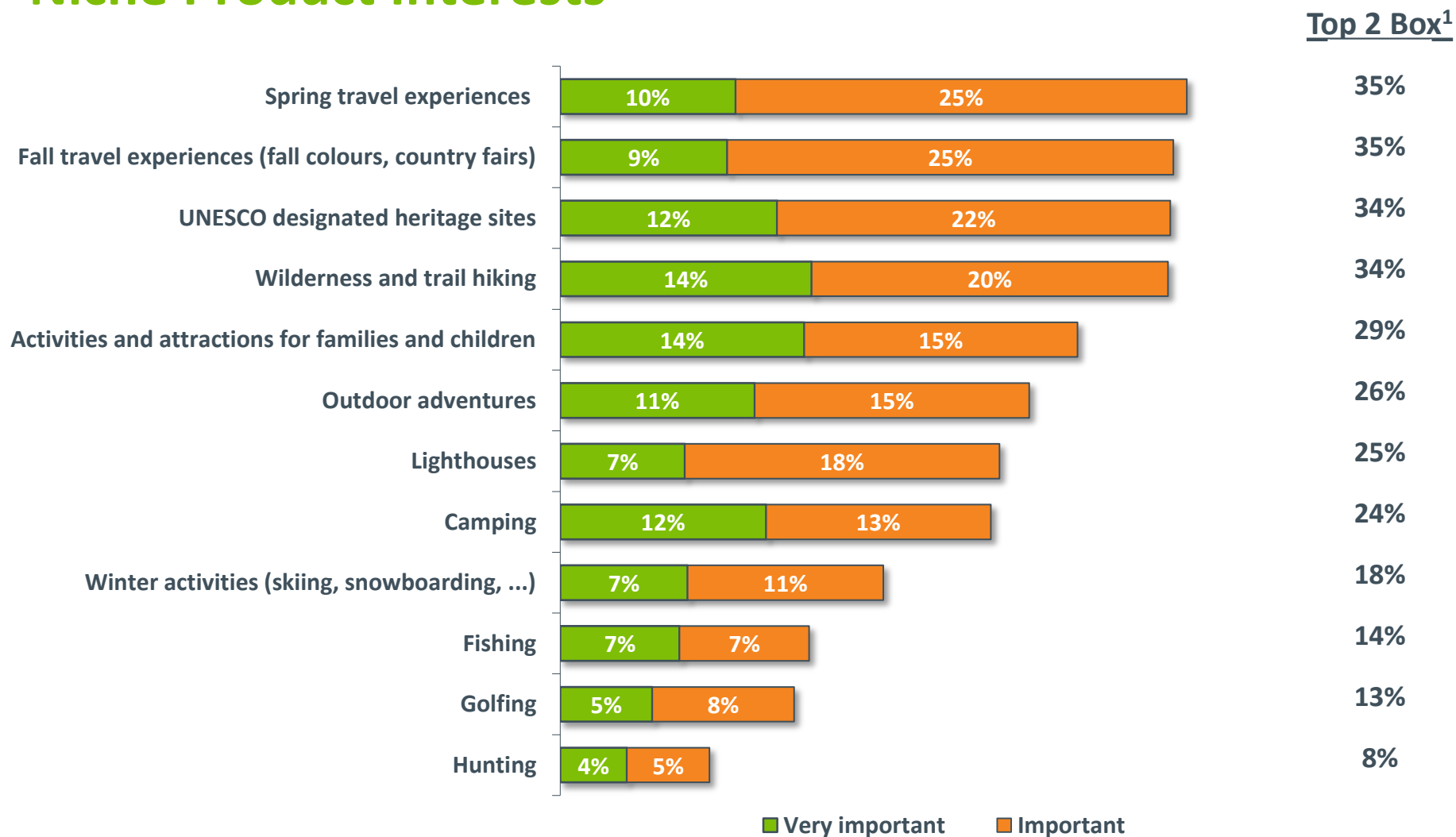
- Canadian travellers who are at least somewhat interested in visiting NL on a vacation are seeking similar experiences as all Canadian travellers but at greater levels of importance to destination selection
- This applies in particular to ocean adventures, nature and wildlife, scenic driving and local festivals/events

Note: ¹Top 2 Box refers to a rating of 'Very Important' or 'Important' on a 5-point importance scale.

Niche Product Interests

- Among niche products, wilderness and trail hiking as well as shoulder season travel (spring, fall) and UNESCO designated heritage sites top the list, being important to about one third of Canadian travellers when selecting a vacation destination
- Activities for families and children are important for destination selection for nearly 3 in 10 Canadian travellers
- Outdoor adventures (26%), lighthouses (25%) and camping (24%) are appealing to approximately one quarter of Canadian travellers, speaking further to the importance of the great outdoors to Canadians
- Winter activities (18%), fishing (14%), golfing (13%) and hunting (8%) are important to only rather small segments of Canadian travellers when deciding on a travel destination

Niche Product Interests



Base: Canadian travellers (n=1,510)

Note: ¹Top 2 Box refers to a rating of 'Very Important' or 'Important' on a 5-point importance scale.

C2. We are interested in knowing what you are looking for in a vacation/pleasure trip. Please indicate how important each one is to you personally, when deciding on a destination for a vacation/pleasure trip.

Niche Product Interests

Activity / Experience	Level of importance (Top 2 box ¹)	
	Canadian travellers (n=1510)	Interested in Newfoundland and Labrador (n=823)
Spring travel experiences	35%	44%
Fall travel experiences (fall colours, country fairs)	35%	42%
UNESCO designated heritage sites	34%	40%
Wilderness and trail hiking	34%	41%
Activities and attractions for families and children	29%	31%
Outdoor adventures	26%	32%
Lighthouses	25%	32%
Camping	24%	30%
Winter activities (skiing, snowboarding, ...)	18%	23%
Fishing	14%	18%
Golfing	13%	16%
Hunting	8%	11%

Higher importance of niche activities and experiences among those interested in visiting NL

- Canadian travellers who are at least somewhat interested in visiting NL on a vacation trip vacation are seeking similar experiences to those of all Canadian travellers but at greater levels of importance to destination selection
- This applies in particular to spring and fall travel, hiking, lighthouses and UNESCO sites

Note: ¹Top 2 Box refers to a rating of 'Very Important' or 'Important' on a 5-point importance scale.

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5 - Trip Planning Behaviour for Canadian Travellers

Information Sources for Trip Planning

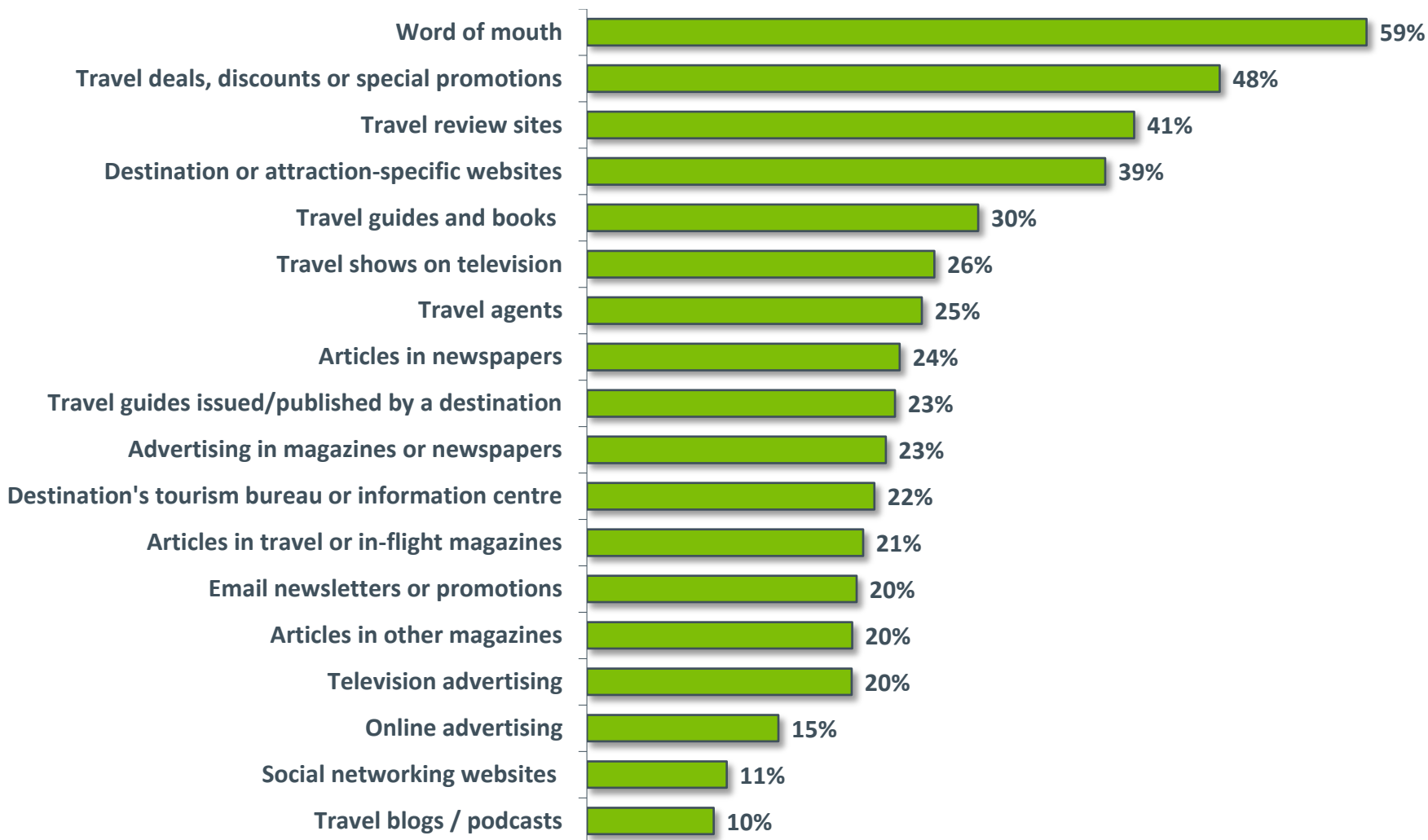
- Canadian travellers seek information from a wide variety of sources when planning their vacations
- Word of mouth is the most widely used information source, with 59% of travellers using it when selecting a vacation destination
 - Word of mouth is also the most influential source of information, with 25% of Canadians indicating that it has the most influence on their decision when selecting a vacation destination
- Travel deals, discounts and promotions are used by just under half (48%) of Canadian travellers to gather information to help them make a decision
- Travel review sites (41%) and destination or attraction specific websites (39%) also influence the decisions of about 4 in 10 Canadians
- Travel guides / books (30%) and TV travel shows (26%) round out the top 6 information sources for Canadian travellers when selecting a vacation destination
- Travellers specifically interested in Newfoundland and Labrador showed similar tendencies in their use of travel information sources, with the same sources having the greatest influence as for all Canadians

Information sources with the most influence on travellers' selection of a vacation destination

(% of Canadian travellers who indicated the source as most influential on their decision)

- Word of mouth (25%)
- Travel deals, discounts, special promotions (14%)
- Travel review websites (9%)
- Destination-specific websites (7%)
- Travel guides and books (6%)

Information Sources for Trip Planning



Base: Canadian travellers (n=1,510)

C3A. Generally, what sources of information influence your decision when selecting a destination for a vacation/pleasure trip?

Trip Planning Horizon

Timing of travel research before start of a vacation trip



Base: Canadian travellers (n=1,510)

C4. After deciding on a destination for a vacation/pleasure trips, how far in advance of departure do you usually start researching the details for your trip?

Planning in advance is common among Canadian travellers

- Over half of Canadian travellers start planning their trip 1 – 5 months in advance of departure, including 36% who plan at least 1 month in advance
- Over 1 in 5 Canadians (23%) plan even further ahead, starting to research their trips 6-12 in advance of departure
- There are few Canadians who either take only a very short or longer time to plan
 - Only 4% start planning 2 weeks ahead
 - Only 3% start planning more than a year ahead

Trip Booking Preferences

Advance online booking of transportation to and from the destination is a common preference among Canadian travellers

- When it comes to booking transportation to and from a destination as well as booking paid accommodations for a vacation trip, Canadian travellers have a definite preference for booking these in advance, with about 9 in 10 Canadians doing so
 - Transportation options during the trip are kept somewhat more flexible, with 77% of travellers booking in advance and 26% of travellers also booking while on the trip
 - Online booking of these trip components is the preferred option for two thirds of travellers
- Travellers keep their options open when it comes to activities, attraction visits and special events or shows during their vacation, with 7-8 in 10 Canadians booking these while travelling. Special events have a relatively high pre-booking rate, with 43% of travellers doing so
 - In most cases, travellers book/purchase activities (54%) and attraction visits (57%) in person while over one third (35% and 34% respectively) also go online
 - About as many travellers purchase special event tickets online (43%) as do in person (46%)

Trip Booking Preferences

Transportation			Paid accommodations	At the destination		
To destination	From destination	During the trip		Activities	Ticket to special events/shows	Tickets to attractions

Time of booking:

Before departure	95%	92%	77%	87%	35%	43%	29%
During the trip	6%	9%	26%	20%	78%	70%	81%

Booking preference:

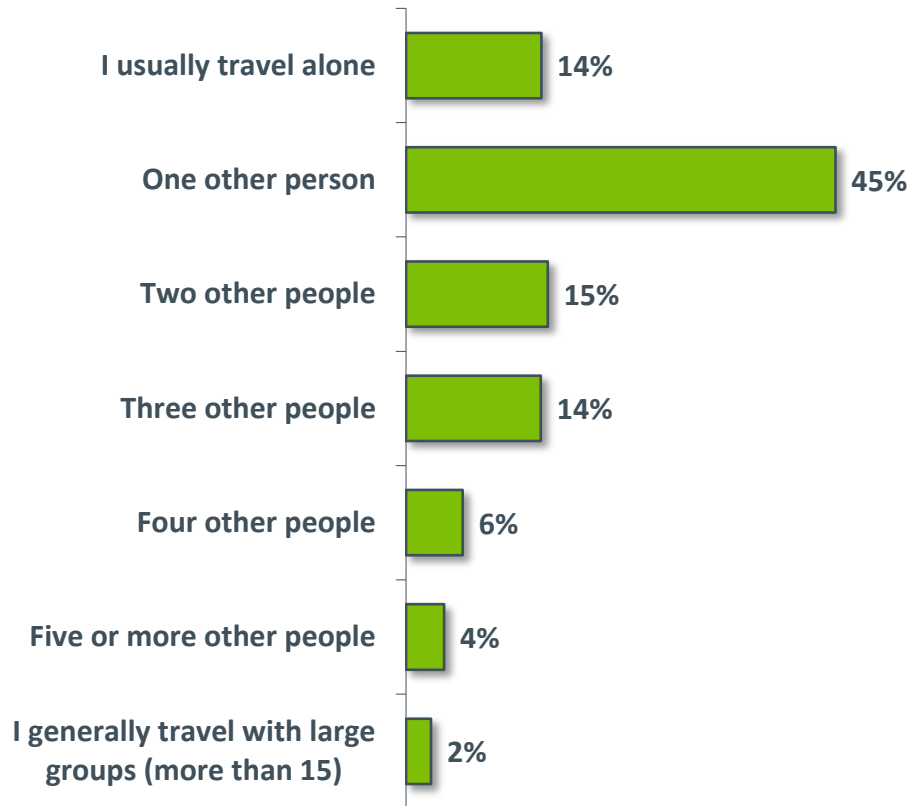
Online	73%	65%	60%	69%	35%	43%	34%
Telephone	13%	18%	14%	17%	11%	11%	9%
In person	14%	17%	26%	14%	54%	46%	57%

Base: Canadian travellers (n=1,510).

C5A. When do you generally book the following **vacation/pleasure trip** components?

C5B. How do you prefer to book these trip components?

Travel Party Size



Canadians like company when travelling

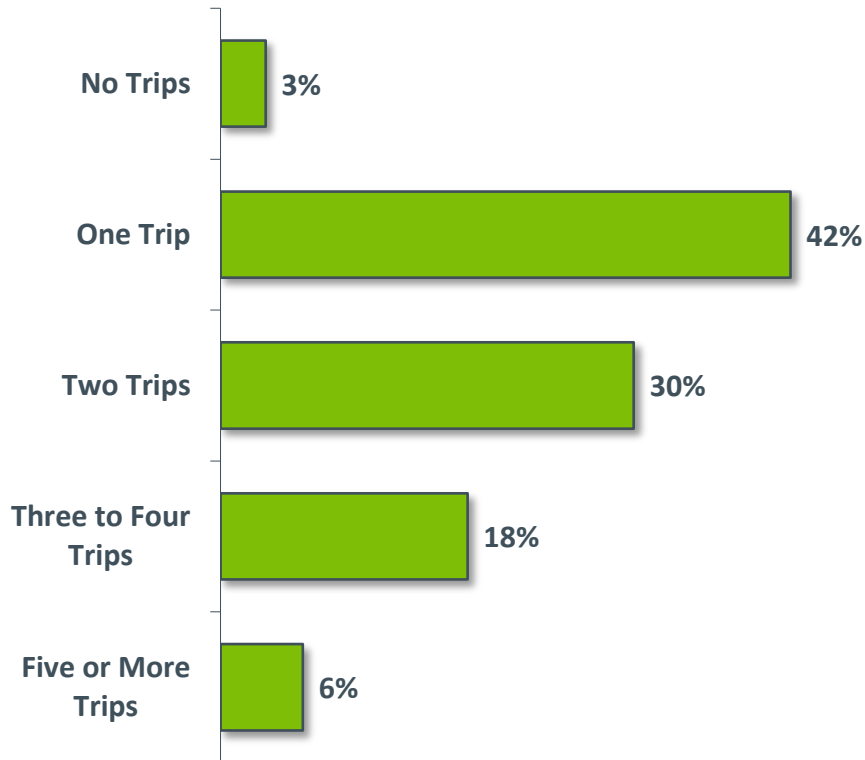
- 86% of Canadian travellers generally go on vacation with other people, including almost half (45%) who travel with just one other person
 - Over half of those travelling with others are on vacation as couple with no children (53%)
 - Nearly one quarter of Canadians (24%) travels with children
 - Another 20% generally travel with an extended group of people, including 8% who travel with family and 12% with friends
- Over one third of Canadians travel in groups of 3 to 5 people while only a very small portion takes off on vacation with large groups of more than 15 people (2%)

Base: Canadian travellers (n=1,419); "Unsure" responses removed

C6. With how many **other** people do you usually travel on **vacation/pleasure trips**?

Travel Intensity

Average number of vacation trips per year (past 3 years)



On average, Canadian travellers take about 2 vacation trips a year

- Over half of Canadian travellers (55%) take, on average, 2 or more vacation trips per year, including nearly one quarter of Canadian travellers who take 3 or more trips
- Almost 2 in 10 Canadians are off on vacation 3 to 4 times a year while a much smaller portion – only 6% - are avid travellers with 5 and more trips
- At 42%, the largest proportion of Canadian travellers, takes just one vacation trip a year
- Among Canadian travellers, residents of BC and the Maritimes tend to travel more while residents of ON and MB/SK tend to go on fewer trips

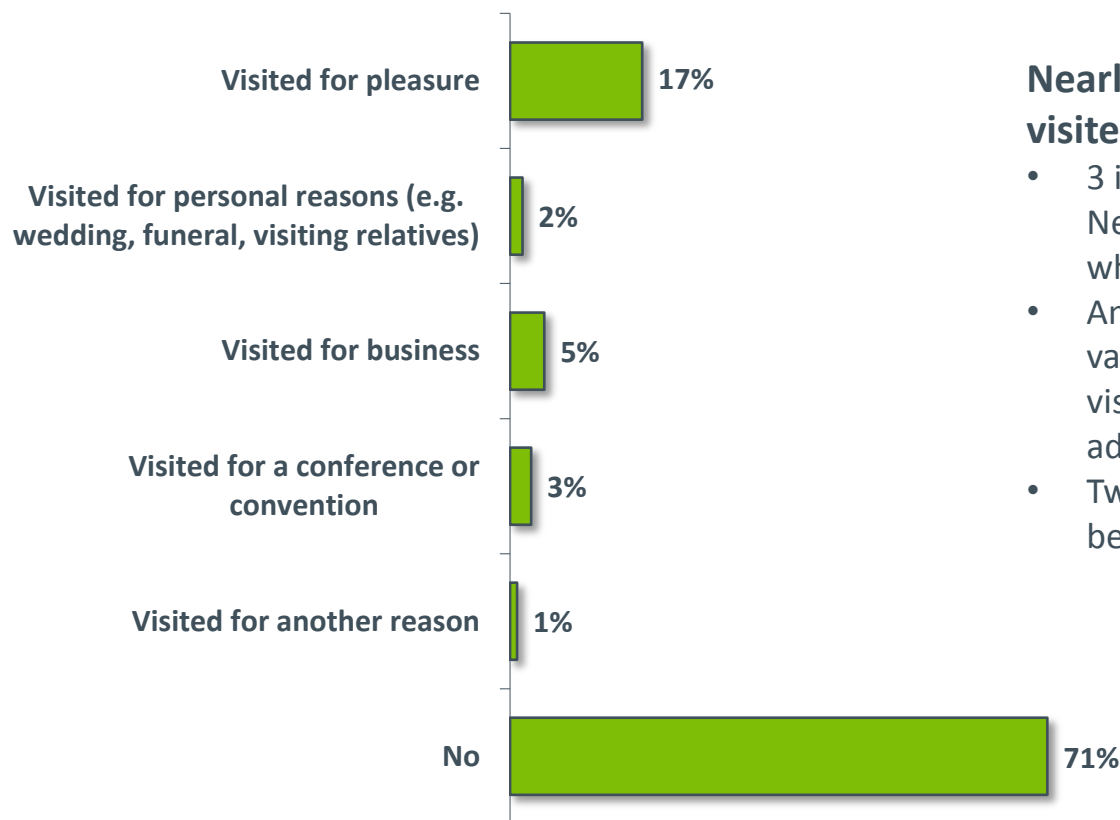
Base: Canadian travellers (n=1,420), "Don't know" responses removed; includes in-province vacation trips

C8. Thinking about the past three years, how many vacation/pleasure trips did you take, on average, per year?

6 - Vacation Destination Newfoundland and Labrador

Newfoundland and Labrador Travel Incidence

Visits to Newfoundland and Labrador by Canadian travellers



Nearly 2 in 10 Canadian travellers have visited the province on a vacation trip

- 3 in 10 Canadian travellers have been to Newfoundland and Labrador, including 17% who visited for vacation
- Among those who have not visited for vacation but have been to the province, 5% visited for business purposes and an additional 3% to attend a conference
- Two thirds of vacation visitors have also been to the province for another purpose

Base: Canadian travellers (n=1,510)

D6A. Have you ever travelled to the province of Newfoundland and Labrador just for vacation or pleasure?

D6B. Have you ever travelled to the province of Newfoundland and Labrador for another purpose?

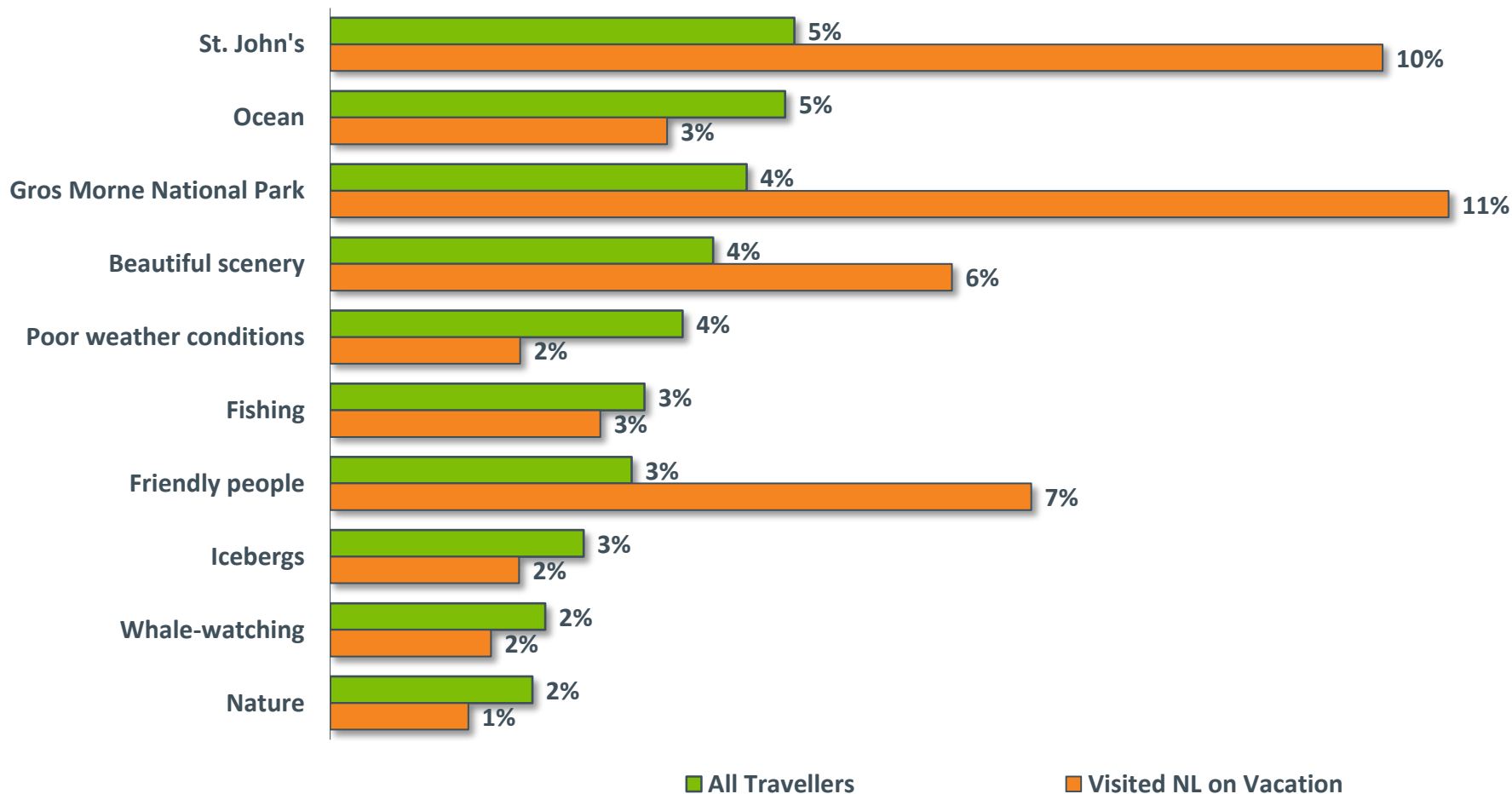
Vacation Destination: Newfoundland and Labrador

Canadians have varied associations with Newfoundland and Labrador as a vacation destination

- Canadian travellers have a variety of top of mind impressions about the province as a vacation destination
 - St. John's, the ocean and Gros Morne National Park are top impressions among all Canadian travellers
 - Among those who indicated that they have at least 'good' knowledge of vacation travel opportunities in NL and those at least somewhat interested in vacationing in NL, the picture is similar but Gros Morne and St. John's stand out
- Beautiful scenery is also on travellers' minds when they think of vacationing in the province
- Fishing, friendly people and icebergs also come to mind of many Canadians
- It is noteworthy that among Canadian travellers who have previously visited NL on vacation, their top of mind impressions of the province are considerably stronger compared to Canadian travellers in general
 - Gros Morne and St. John's in particular have a strong top of mind presence
 - Friendly people and beautiful scenery also stand out compared to all travellers in general
- Poor weather, on the other hand, is less of a top of mind thought among those who know about NL, are interested in coming here or have already experienced it

Vacation Destination Newfoundland and Labrador

Top of mind associations with Newfoundland and Labrador as a vacation destination

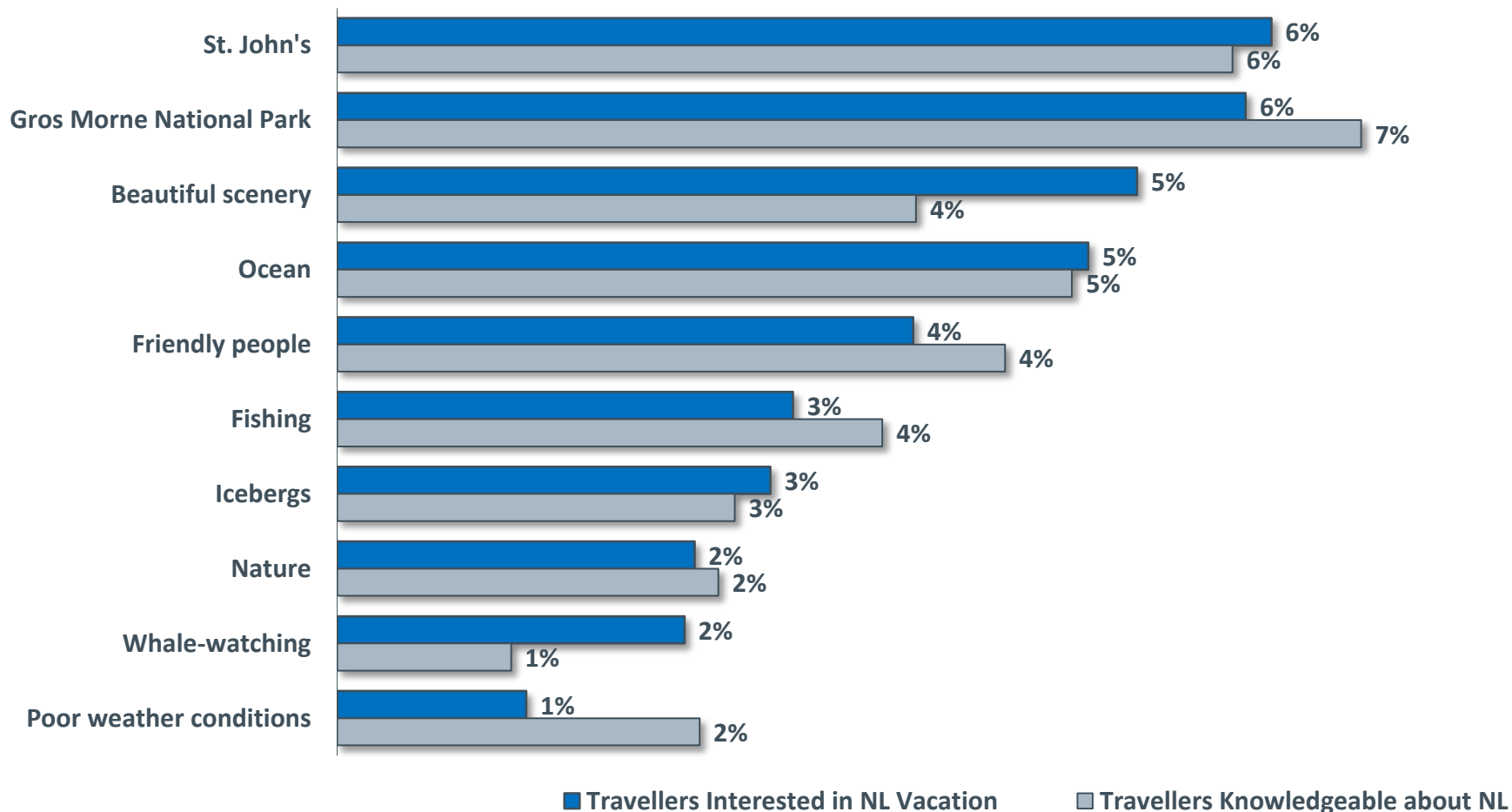


Base: Canadian travellers (n=1,510); Visited NL on Vacation (n=275)

D1. Thinking about Newfoundland and Labrador as a **vacation destination**, what comes to mind first?

Vacation Destination Newfoundland and Labrador

Top of mind associations with Newfoundland and Labrador as a vacation destination



Base: Canadian travellers - Travellers indicating 'good', 'very good' and 'excellent' knowledge of NL (n=586); Travellers Interested in NL Vacation (n=823)

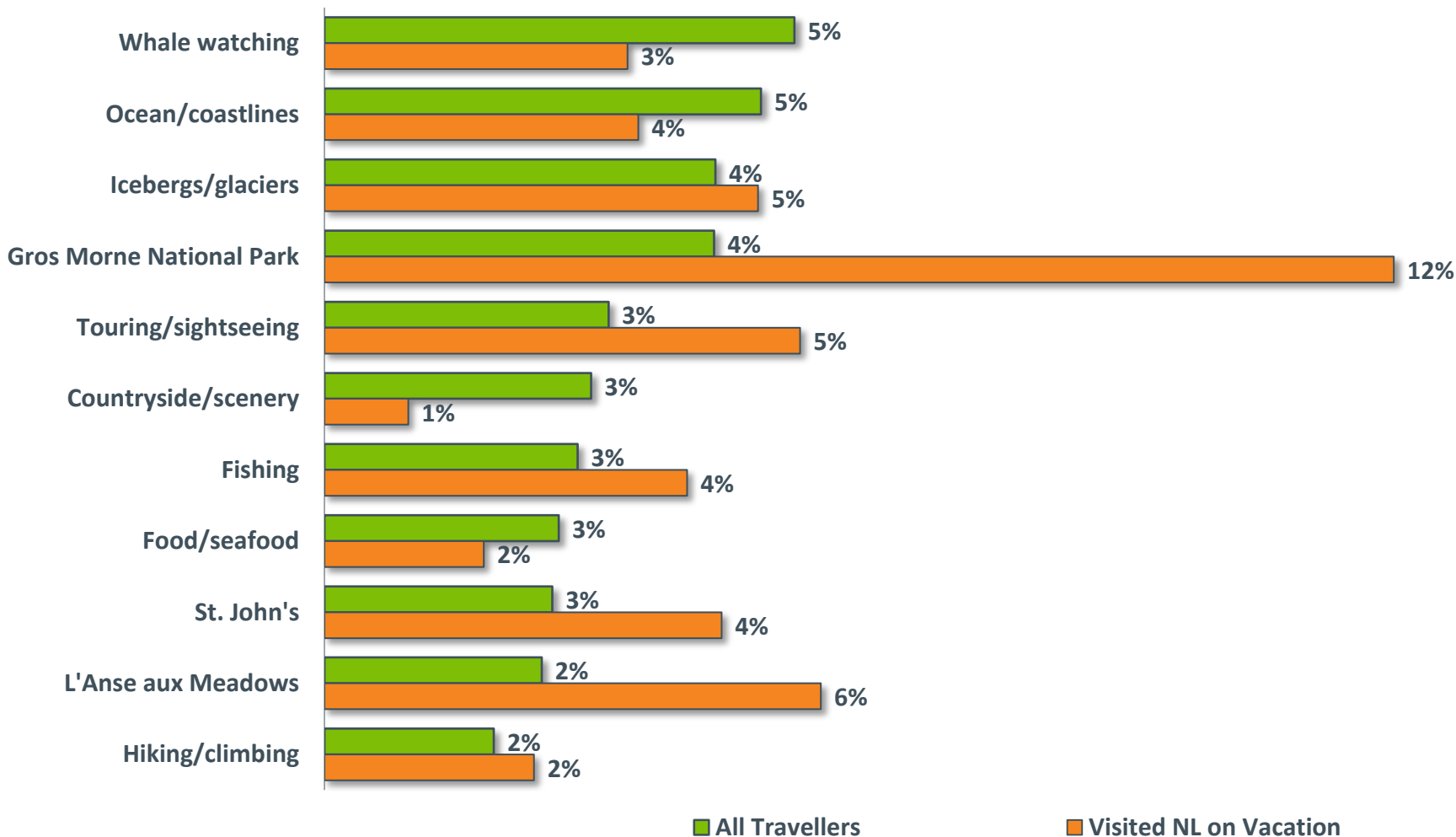
D1. Thinking about Newfoundland and Labrador as a **vacation destination**, what comes to mind first?

Desired Vacation Experiences in Newfoundland and Labrador

Whale watching and Gros Morne are top draws to the province

- When it comes to visiting NL for vacation, Canadian travellers are looking for a great variety of experiences
- Whale watching, seeing the ocean/coastlines, seeing icebergs and visiting Gros Morne are the top vacation experiences Canadian travellers are seeking in the province
 - Among those who indicated that they have at least 'good' knowledge of vacation travel opportunities in NL and those who have already visited NL on vacation, visiting Gros Morne tops the list by far
 - Gros Morne is also among the top 3 experiences sought among those who are at least somewhat interested in vacationing in the province, with whale watching and seeing the ocean coming out on top for this segment
- Touring, taking in the scenery, fishing and food/seafood are also popular choices among Canadian travellers
- Besides Gros Morne, St. John's and L'Anse Aux Meadows are the only other two specific locations/attractions travellers want to see that made it into the "Top 10" of desired vacation experiences
- While those with some knowledge of NL as a vacation destination and those interested in visiting appear to be more definite in their desired experiences, those who have already visited are significantly more specific
 - Gros Morne is by far their top 'one thing to do or see' in the province, with 12% mentioning it, with L'Anse aux Meadows (6%) and Touring/sightseeing (5%) rounding out their top 3 desired experiences
 - It should be noted that the choices of desired vacation experiences are likely impacted by previous travel to the province as travellers are likely to pick those experiences that they either may not have had a chance to do or see during their previous trip or would like to see again to explore in more detail

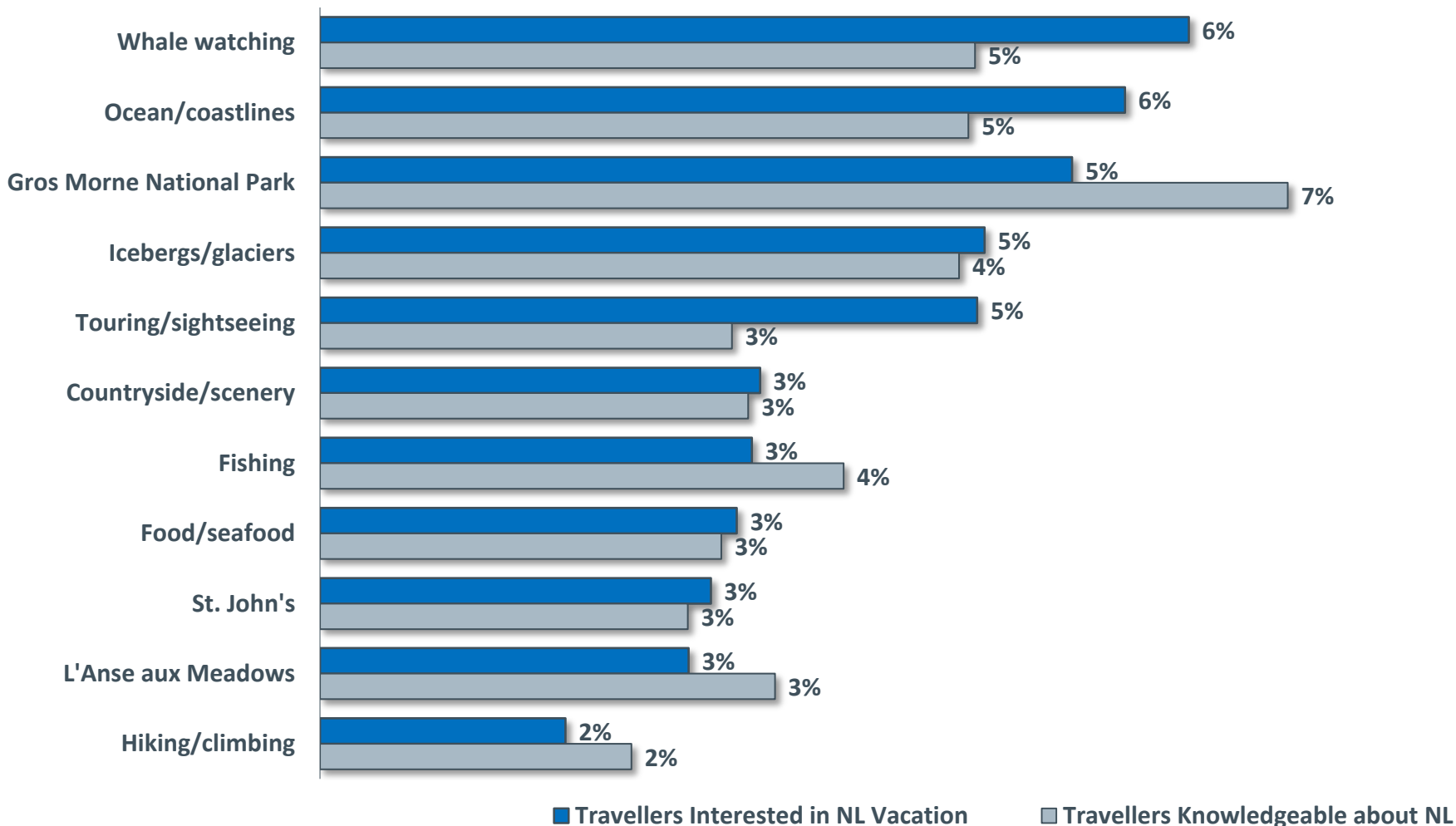
Desired Vacation Experiences in Newfoundland and Labrador



Base: Canadian travellers (n=1,510); Travellers Knowledgeable about NL (n=586); Visited NL on Vacation (n=275)

D4. If there was one thing that you would really like to see or do in Newfoundland and Labrador, what would it be?

Desired Vacation Experiences in Newfoundland and Labrador



Base: Canadian travellers (n=1,510); Travellers Knowledgeable about NL (n=586); Visited NL on Vacation (n=275)

D4. If there was one thing that you would really like to see or do in Newfoundland and Labrador, what would it be?

Impressions of Newfoundland and Labrador

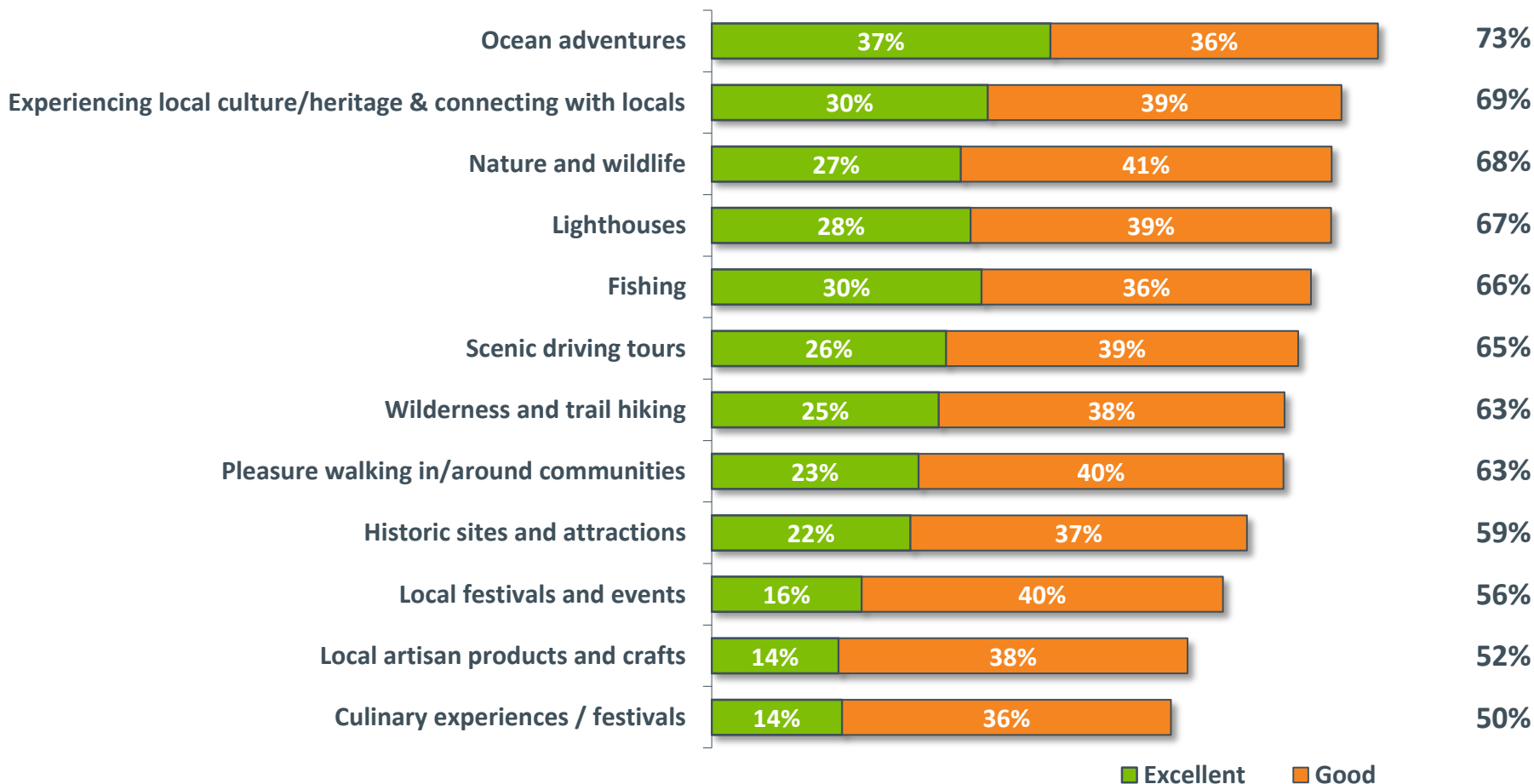
Canadian travellers have an appreciation for the province's vacation offerings

- As with top of mind associations and desired vacation experiences in Newfoundland and Labrador, Canadian travellers strongly connect the province with the ocean, with 73% rating “Ocean adventures” (including whale watching and seeing icebergs) as ‘good’ or ‘excellent’
- The province is rated highly by more than half of Canadians for the experiences it has to offer which connect travellers with the destination:
 - Local culture, connecting with local people (69% rating ‘excellent’ or ‘good’)
 - Scenic touring (65%), pleasure walking in communities (63%)
 - Historic sites and attractions (59%)
 - Local festivals and events (56%),
 - Local artisan products (52%)
 - Culinary experiences (50%)
- Fishing, nature and hiking are also perceived as excellent/good vacation experiences in the province
- With high ratings given to those experiences which are important to travellers when they decide on a vacation destination, the province is well positioned to attract Canadian travellers
- The impressions of Newfoundland and Labrador are stronger across all experiences for those who have visited than for those who have never visited and are also stronger for those interested in visiting compared to those not interested in visiting

Impressions of Newfoundland and Labrador

Top rated vacation activities and experiences in Newfoundland and Labrador

Top 2 Box¹



Base: Canadian travellers (n=1,510)

Note: ¹Top 2 Box refers to a rating of 'Excellent' or 'Good' on a 5-point excellence scale

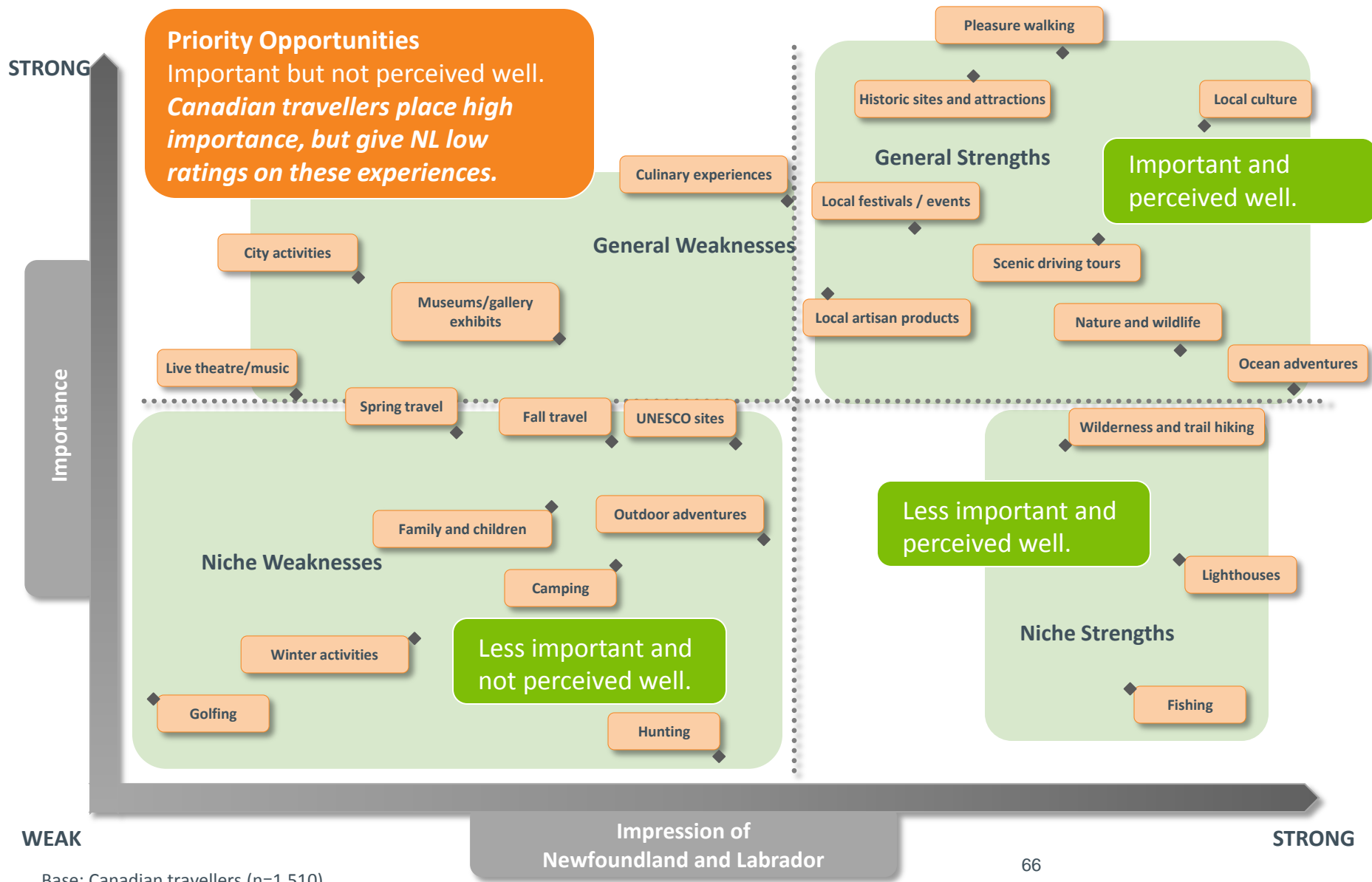
D5. Based on your personal experience, or your general impressions from anything you have seen, read or heard, how would you rate Newfoundland and Labrador on the following;

Vacation Experiences in Newfoundland and Labrador

Connecting desired vacation experiences and impressions of the province provides insights for developing opportunities

- The strengths and weaknesses map plots the importance of experiences against travellers' impression of Newfoundland and Labrador on those experiences
- The four quadrants indicate strengths and weaknesses for both general interest and niche experiences
 - General strengths are items that are both important and on which NL is rated highly
 - General weaknesses are items important to travellers but travellers do not perceive NL to be strong in those areas
 - Niche strengths are areas with less importance to travellers, where NL is high performing
 - Niche weaknesses are both less important to travellers and lower performing for NL
- The map shows that the province has a strong offering that allows travellers to connect with the destination, together with opportunities to experience the ocean, nature and wildlife
 - The availability of these experiences in combination makes NL unique as a place to visit
 - The province also offers some niche experiences such as hiking and fishing, with an opportunity to further develop the attractiveness of its UNESCO sites, outdoor adventures and hunting for special interest segments among Canadian travellers
- General weaknesses identified for Newfoundland and Labrador are city activities, museums and galleries, live theatre and musical performances as well as culinary experiences
 - These represent priority opportunities for experience development to make NL more attractive as a vacation destination for those travellers to whom these experiences are important when choosing a vacation destination

Vacation Experiences in Newfoundland and Labrador: Strengths and Weaknesses Map

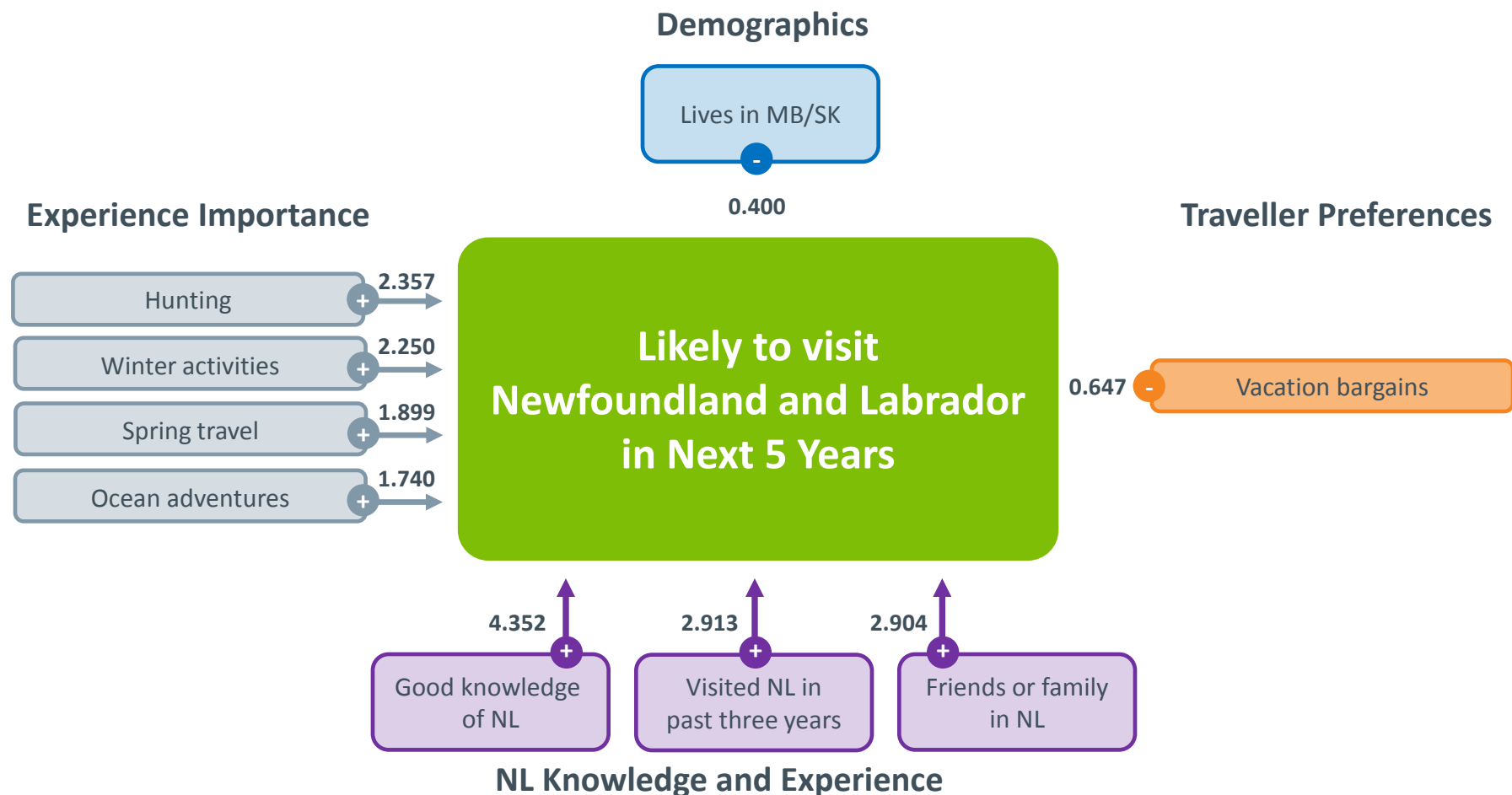


Key Drivers of Visitation to Newfoundland and Labrador

Knowledge of the province is a key driver for visitation

- The chart on the next slide shows the key drivers of Canadian travellers' intent to visit Newfoundland and Labrador within the next five years
- The strongest variable driving travellers' intent to visit the province is knowledge of Newfoundland and Labrador; however, this variable may be working both ways as highly interested travellers are likely to seek out information about the province as part of their trip planning
- A previous visit and having friends and family in the province can also catalyze travel to the province. Canadian travellers with either of these characteristics are nearly three times more likely to visit the province compared to Canadian travellers overall
- Interest in hunting, winter activities, spring travel or ocean adventures are also drivers of travel intent
 - While ocean adventures are clearly and strongly associated with the province, the other experience interests are niche interests and may speak to an adventurous nature of the travellers themselves
- Traveller characteristics as negative drivers
 - Canadian travellers residing in Manitoba/Saskatchewan are substantially less likely to visit the province, likely due to the fact that destinations appealing to residents of these provinces are closer and more affordable
 - Travellers with a strong preference for vacation bargains and special promotions are also less intent on visiting this province, likely relating to their perception that Newfoundland and Labrador is an expensive travel destination

Key Drivers of Visitation to Newfoundland and Labrador



Base: Canadian travellers (n=1,510)

Note: Numbers are odds ratios. If >1, the odds ratio is the factor by which the odds of being interested in visiting the destination increase as the independent variable increases; if <1, it is the factor by which the odds of being interested in visiting decrease.

Travel Barriers for Newfoundland and Labrador

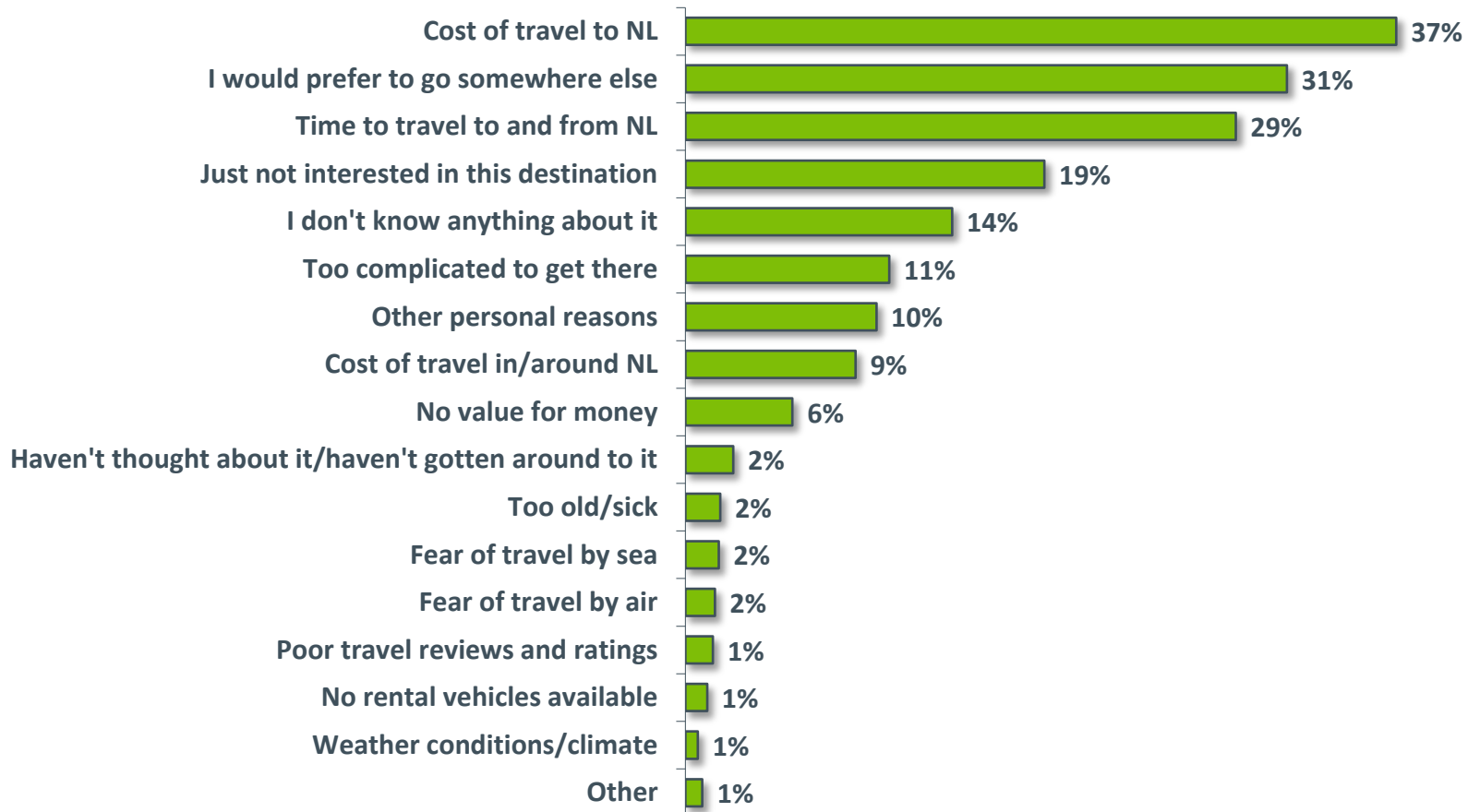
Cost is a main reason for not having vacationed yet in NL

- Nearly 4 in 10 Canadian travellers who have never visited the province for vacation indicated that the cost of travel to NL was holding them back
- Time to travel to the province has kept about 1 in 3 Canadians away while just as many would prefer to visit another destination
- Other reasons, such as low interest in or knowledge of the destination, and personal reasons, appear to be of lesser significance to the majority of Canadian travellers
- As well, only 1 in 10 travellers found it too complicated to get here or were prevented by the cost of travel in the province
- Only a small number of travellers (6%) believe that they would not receive value for money by vacationing in the province

Potential investment in time and cost also made some Canadian travellers change their travel plans

- Among Canadian travellers who were planning or considering a visit to NL but went to another destination instead (16% of all travellers), ease of getting there as well as less time and less cost to get there, were the main reasons for choosing an alternative destination
 - For some travellers, not having enough vacation time or better value for money were also reasons for changing their vacation destination while others changed plans to attend a specific event (family reunion, wedding, concert or festival)
 - Only a very small portion of travellers changed their minds due to a specific activity they wanted to participate in (e.g. going to a beach, skiing, hiking, golf)
- For more than half of those who changed travel plans (55%), alternative destinations included another province or territory in Canada while about one third (32%) decided on a destination in the US

Travel Barriers for Newfoundland and Labrador



Base: Canadian travellers who have never travelled to Newfoundland and Labrador (n=1,235)

D7. Why haven't you travelled to Newfoundland and Labrador for vacation or pleasure?

The background features several thin, light green wavy lines at the top and a series of thick, overlapping green bands at the bottom, creating a sense of movement and depth.

7 – Canadian Traveller Demographics

Traveller Demographics by Region

	TOTAL (n=1,510)	BC (n=164)	AB (n=117)	MB/SK (n=142)	ON (n=470)	QC (n=498)	Maritimes (n=119)
Age:							
18 to 24	11%	7%	9%	17%	14%	8%	12%
25 to 34	16%	18%	16%	11%	15%	18%	10%
35 to 44	16%	17%	20%	13%	15%	14%	21%
45 to 54	22%	24%	23%	27%	20%	25%	24%
55 to 64	17%	15%	16%	12%	18%	20%	14%
65 to 74	14%	13%	16%	17%	13%	12%	16%
75+	4%	6%	1%	3%	5%	3%	2%
Gender:							
Male	50%	50%	50%	50%	49%	49%	49%
Female	50%	50%	50%	50%	51%	51%	51%

Base: Canadian travellers (n=1,510)

S2. In what year where you born?

S3. Are you (Gender)?

Traveller Demographics by Region

	TOTAL (n=1,510)	BC (n=164)	AB (n=117)	MB/SK (n=142)	ON (n=470)	QC (n=498)	Maritimes (n=119)
Household Size:							
Mean	2.6	2.4	3.0	2.3	2.6	2.4	2.5
Children in Household:							
% of Households with children under 18	25%	23%	27%	22%	23%	27%	30%
Education:							
High school or less	19%	24%	18%	24%	17%	18%	26%
Community/ technical college/ vocational training	30%	34%	29%	30%	29%	33%	29%
University degree	34%	26%	37%	35%	38%	32%	32%
Post-graduate degree	16%	15%	17%	10%	16%	17%	13%

Base: Canadian travellers (n=1,510)

E2. How many people live in your household?

E3. How many people in your household are 17 years or younger?

E4. What is the highest level of education that you have completed?

Traveller Demographics by Region

	TOTAL (n=1,510)	BC (n=164)	AB (n=117)	MB/SK (n=142)	ON (n=470)	QC (n=498)	Maritimes (n=119)
Income:							
Less than \$40,000	16%	18%	14%	16%	12%	20%	20%
\$40,000-\$69,999	25%	26%	18%	32%	25%	27%	31%
\$70,000-\$99,999	18%	21%	18%	16%	18%	17%	18%
\$100,000-\$149,999	17%	15%	22%	18%	17%	16%	15%
\$150,000 or more	12%	9%	17%	9%	13%	10%	6%
<i>Prefer not to say</i>	12%	11%	11%	10%	15%	10%	10%
Close Friends or Relatives in Newfoundland and Labrador:							
Yes	13%	8%	15%	14%	14%	8%	41%

Base: Canadian travellers (n=1,510)

E5. Which of the following categories best corresponds to your total annual household income before taxes and deductions?

E1. Do you currently have any friends or family living in Newfoundland and Labrador?